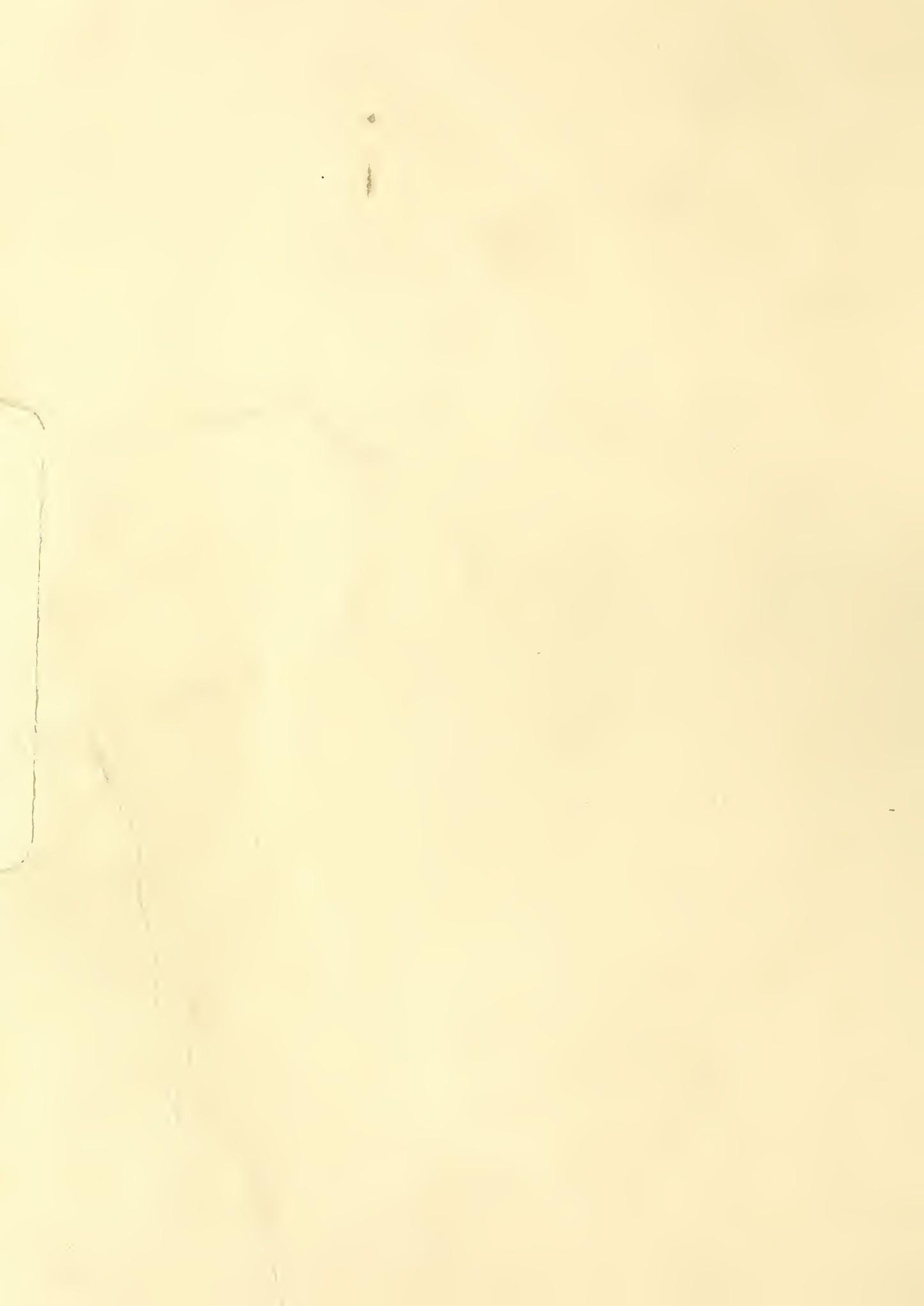


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Vegetable Situation

Economics, Statistics,
and Cooperatives Service

TVS-209

U.S. Department of
Agriculture

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1978

Approved by the
World Food and
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THE VEGETABLE SITUATION

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May, August, and November.

SUMMARY

Fresh Market Vegetable Acreage Up 3 Percent

The summer area for harvest of 14 *fresh market vegetables* is 3 percent larger than a year earlier. Among the major crops, this year there are larger areas of cabbage, corn, lettuce, onions, peppers, snap beans, and tomatoes but moderately less carrot and celery acreage. Potential output would be down 1 percent if yields are average. Melon acreage is larger this year, mostly due to more cantaloups and honeydews planted in California.

Fresh market vegetable prices reached a record high this past spring quarter, showing unusual volatility as well. In May, lettuce prices (f.o.b., California) moved from \$18 per carton of 24 heads to \$3.25 in the short span of less than three weeks, then bounced to \$13 before the first week of June ended.

Winter rains in California and cold February weather in Florida disrupted usual planting activity for several spring harvested crops. By late June, a more normal vegetable supply pattern was beginning to emerge, though in many instances, harvests of many crops were delayed a week or two. Seasonally heavy summer harvest volume started in July, and grower prices have begun to move downward.

Processed Vegetables

Growers and processors decreased their acreage of major processing vegetables by 1 percent this year. A 13-percent decline in contract tomato acreage and a 3-percent cut in corn was not offset by increases for other crops. If average yields are realized, the total contract tonnage will be moderately less this year because tomatoes comprise nearly 60 percent of the volume produced. In turn, this suggests a smaller 1978/79 supply of canned vegetables at moderately higher prices, because the larger carryover cannot be expected to offset the smaller tomato packs to be made this summer and fall.

If tomatoes are eliminated from consideration, a somewhat different supply picture emerges, leaving

the canned and frozen items which compete freely with each other, such as snap beans, peas, corn, carrots, and broccoli. Here, the 1978/79 picture is likely to be one of slightly larger supplies because packs of certain vegetables stand a good chance of being slightly larger. The combined carryover of these canned vegetables is slightly below that of a year earlier, while the carryover of frozen vegetables is substantially larger. Even so, any small increases in packs would not imply lower prices in view of sharply increased costs of processing in 1978.

Summer potato production, one of the smallest crops of recent record, was 4 percent less than a year earlier, at 21.2 million cwt. This could mean higher prices than a year earlier this summer. But relatively large quantities of Norgold Russets, classed as fall potatoes, are moving to market now. This could alter the U.S. summer price prospect to some extent.

Many producing areas, especially those on the Eastern Seaboard, began harvest a week or two later than normal this year. This tended to maintain prices at a high level up to mid-July. And, with a smaller supply to market, it is likely that there will be a minimal quantity held over to compete with the important fall crop to be harvested beginning in early September.

If fall crop growers plant according to their intentions, and if yields are close to the most recent 5-year average, grower prices this fall could be expected to average only a few cents higher than the relatively low \$3.11 U.S. average fourth quarter 1977 price.

Dry edible bean prices have been easing downward as buyers anticipate larger supplies this fall from a 16-percent larger acreage for harvest. Because rains disrupted Michigan's harvest last year, 1977 U.S. production was the smallest since 1973.

RECENT DEVELOPMENTS AND OUTLOOK

FRESH VEGETABLES

The prospective area of 14 fresh market vegetables this summer is estimated at 333,150 acres, 3 percent more than last year. Potential output based on recent yield history suggests a 1-percent smaller production.

Among the major crops there are larger areas of cabbage, corn, lettuce, onions, peppers, snap beans, and tomatoes, and moderately less of both carrots and celery.

Combined acreage of melons is substantially larger, mostly due to the increase in cantaloup and honeydew melon acreage in California. California also had a substantial increase in watermelon

acreage, whereas most of the other major States showed either no change or an actual decrease in acreage.

Fresh vegetable prices, while record high this past spring quarter, also showed unusual volatility. The index of prices received by growers for fresh market vegetables moved from 209 (1967=100) to 296 between March and April, backing off to 247 in May. Probably lettuce prices illustrated this as vividly as any commodity. During May, California f.o.b. prices went from \$16.50 per crate to \$3.25 in the short span of 18 days. Medium sized tomatoes from Florida ranged from \$12.50 per 30-pound carton in April to \$3.60 at the end of May, and bounced back to the \$8.00 level the first part of June. Winter rains, which curtailed lettuce planting in January and February in California, produced temporary shortages in late April and early May. Frost damage and cool weather affected young tomato plants in Florida in late February, disrupting usual spring supply patterns. Sustained cool weather in the Rio Grande Valley of Texas caused much of the early spring onion crop to develop seed stems. Despite a high proportion of unmarketable tonnage, early spring Texas f.o.b. onion prices for Jumbo yellow Granex tumbled from \$7.00 per 50-pound bag to \$2.38 between early April and mid-May. Among the major vegetable crops, onions and sweet corn have been the low-priced vegetables much of the spring.

By late June, f.o.b. prices had settled down, as supplies gradually increased for several of the leading vegetable crops, but the preliminary June

COMMERCIAL VEGETABLES*
INDEX PRICES RECEIVED BY FARMERS



USDA

REG. ESCS 2376-78(8)

Table 1—Vegetables and melons for fresh market: Reported commercial acreage and production of principal crops, selected seasons, 1976, 1977, and indicated 1978

Seasonal group and year	Area				Production			
	Harvested		For harvested major states 1978	1976 total	1977		Major states 1978 ¹	
	1976 total	Total			Total	Major states		
--- 1,000 acres ---								
Winter	183.2	152.8	150.4	178.3	34.3	29.2	29.1	33.1
Spring	381.0	394.4	385.9	377.0	60.2	62.0	61.4	59.5
Summer: ²								
Snap beans	31.5	31.1	28.2	30.1	1.2	1.2	1.0	1.1
Broccoli ³	7.6	12.0	12.0	12.1	.6	.9	.9	.9
Cabbage	26.7	25.9	21.8	23.3	6.6	6.9	6.0	6.1
Carrots ³	14.0	14.6	13.3	12.8	4.1	4.7	4.4	4.1
Cauliflower ³	7.3	8.0	8.0	8.2	.7	.8	.8	.8
Celery ³	6.5	6.6	6.3	5.7	3.2	3.5	3.4	2.9
Sweet corn	110.2	106.3	98.0	101.2	7.5	7.4	6.6	7.0
Cucumbers	15.9	17.3	13.6	14.6	1.6	1.8	1.5	1.6
Eggplant	1.2	1.0	1.0	1.0	.2	.2	.2	.2
Escarole	1.2	1.3	1.3	1.4	.2	.2	.2	.2
Lettuce	49.9	53.8	49.2	50.4	13.1	14.5	13.7	13.6
Green peppers ³	24.0	25.1	22.8	23.3	2.0	2.1	1.9	1.9
Spinach	1.3	1.5	1.5	1.4	.1	.1	.1	.1
Tomatoes	60.0	56.9	47.2	47.7	8.4	8.1	7.2	7.1
Total 14 vegetables ⁴	357.3	361.3	324.2	333.2	49.5	52.4	47.8	47.5
Cantaloupes	47.0	49.4	43.5	51.2	6.6	6.8	6.4	7.5
Honeydews	9.3	9.4	9.4	12.9	1.9	1.9	1.9	2.6
Watermelons	136.5	126.0	113.6	113.7	12.4	12.4	10.9	10.7
Total melons ⁴	192.8	184.8	166.5	177.8	20.9	21.0	19.1	20.8
Total summer ⁴	550.1	546.1	490.7	511.0	70.4	73.4	66.9	68.3

¹ Based on 3-yr. average yield per acre. ² July, August and September. ³ Includes fresh market and processing. ⁴ May not add due to rounding.

Vegetables for Fresh Market, ESCS, USDA.

index of prices received, which covers the first half of the month only, still remained high at 273. The index of fresh vegetable prices for the summer quarter is expected to average moderately higher than a year earlier, but sharply lower than for the past spring.

Fresh Vegetable Use Down Slightly in 1977; Melons Up

Per capita use of fresh market vegetables declined slightly in 1977, moving down to 98.5 pounds from 100.4 in 1976. Although domestic production of 19 major crops was roughly equal to 1976, this by itself would mean a reduced per capita use, as the U.S. market presumably gained 1.7 million people during 1977. Domestic vegetable output was reduced by the January freeze in Florida, but it was offset by larger summer and fall tonnage. Some of the per capita change is also explained by an estimated slight reduction in commer-

cial production of a wide number of minor vegetables for which no separate estimates are made. Imports of fresh vegetables, largely from Mexico, were record large in 1977, moving up to 16.7 million cwt., or 7 percent of our total supply, with the rough estimate for commercial production of minor vegetable crops included. (Home garden vegetable consumption and potato crops are excluded.)

The small, yet persistent, upward turn in fresh vegetable use per capita during the 1970's dipped in 1977, but early indications for 1978 suggest the 100 pounds of 1976 will be exceeded, despite the rainy weather problems in some California lettuce and celery fields this spring. Excluding potatoes, lettuce is the most popular vegetable used—24.5 pounds annually per capita. Tomatoes, at 12.5 pounds, were second and onions, at 10.1 pounds, were third.

Contrary to fresh vegetables, melon use in 1977 on a per capita basis gained 4 percent during the

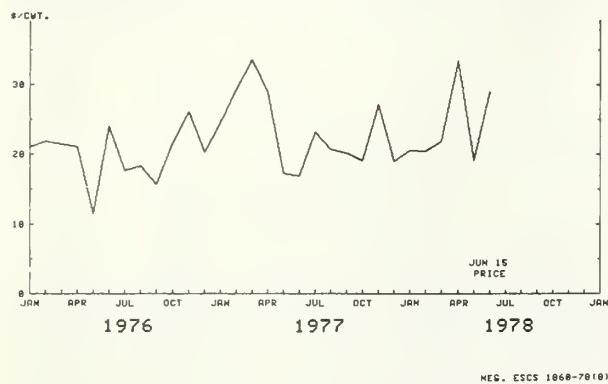
year, as 21.3 pounds of cantaloups, watermelon, and honeydews were used. Melon use has recovered some of the ground lost since 1974 when the comparable figure was only 18.9 pounds. This is still below the 23-pound figure of 1968 and 1970.

Prospects for Major Fresh Vegetables

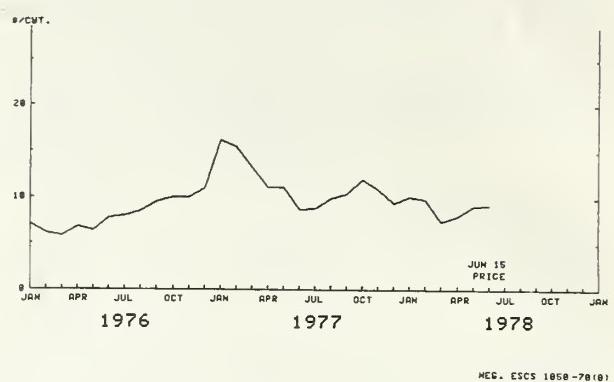
Tomatoes

Summer tomato acreage in the major producing States is estimated at 47,700 acres, 1 percent more than last year. Based on average yields, the summer crop is expected to be about 7.1 million cwt. or 1 percent less than in 1977. Among the leading States, there are no important acreage changes this year.

TOMATOES : U.S. GROWER PRICES



CARROTS : U.S. GROWER PRICES



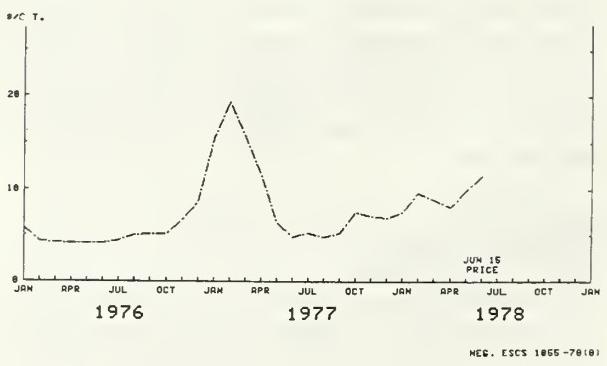
NEC. ESCS 1868-78(8)

Carrot prices during the first half of 1978 have been considerably below those of a year earlier because winter and spring supplies were larger in 1978. However, if the projected 6-percent decrease in summer output materializes, prices will be close to last year's levels for the next several months.

Cabbage

Summer cabbage acreage in 1978 is estimated at 23,300 acres, 7 percent above last year. Potential production, based on average yields of the past 3 years, is expected to be only about 2 percent larger than in 1977. New York, with the largest summer acreage, plans to harvest 5 percent more, North Carolina 15 percent more, and New Jersey 25 percent more. Overall, the Midwest is showing a slight decrease in acreage.

CABBAGE : U.S. GROWER PRICES



NEC. ESCS 1865-78(8)

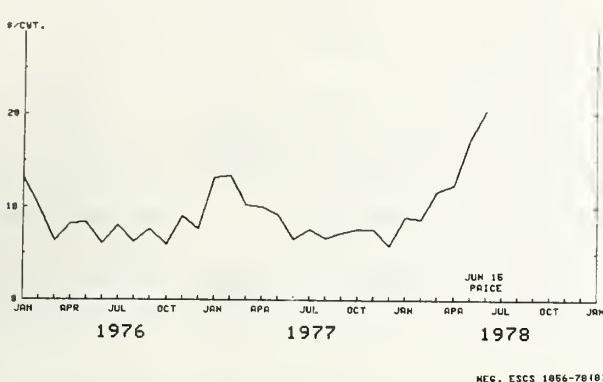
Prices to growers during the period January through April were well below the high levels of a year earlier. In May 1978 cabbage prices were about one-third above last year's prices and in June nearly double. Prices this summer should move downward in view of heavier supplies in the eastern United States.

Celery

Summer celery acreage in 1978 is estimated at 5,670 acres, 11 percent below last year. Production is expected to be 14 percent less than last year.

Grower prices during January and February were below those of a year earlier, but in March began to increase over those of last year. This was because rainy weather interfered with planting and harvesting activity in California and Florida. High celery prices may be expected to continue this summer as greatly reduced supplies are the prospect. Grower prices are expected to average well above last year's levels.

CELERY : U.S. GROWER PRICES



NEG. ESCS 1056-78(8)

LETTUCE : U.S. GROWER PRICES



JUN 16 PRICE
1977
1978

NEG. ESCS 1059-78(8)

California planting which accounts for over 80 percent of the summer volume is showing the same acreage as last year. New York and Colorado acreages are up over 1977. New Jersey is showing a decrease. Growing conditions for the California summer crop have been ideal and there should be moderate prices and a steady supply of this important salad vegetable the balance of the summer.

Reviewing An Unusual Lettuce Season

Rains in California during January and February interrupted harvesting and planting operations. This caused interruptions and gaps in supply lines during April and May and even for the first week of June. The result was the most unusual behavior of prices ever. By May 1, the record high of \$18.00 per carton of 24 heads f.o.b. California was recorded. Then by late May, the f.o.b. price had plummeted as low as \$3.25 per carton, only to rise to \$13.00 per carton on June 1, sliding to \$6.00 and \$7.00 a week later. But, by June 29 and 30, the f.o.b. price of a carton of 24 heads skidded to \$2.75 and rose again to \$4.75 on July 19. Also contributing to these lettuce price gyrations (and perhaps exaggerating them) was the more rigid buying practices of several large users who were not in the market 5 to 10 years ago. This would include the buyers for the now numerous "salad bars," which are often heavily promoted, and would also involve several institutional arrangements where supplies are contracted for in advance.

Onions

Fresh market onion acreage for harvest in summer producing States, including both non-storage and storage onions, is 5.4 percent larger than 1977. This omits California acreage which is primarily used for processing. Production of non-storage type onions is forecast at 3.1 million cwt., down 4 percent from 1977. Certain fields in Texas were

Sweet Corn

Sweet corn acreage for summer harvest is estimated at 101,200 acres, up 3 percent from 1977. Potential summer production is expected to be 5 percent greater than last year. Wet weather delayed early plantings in most areas so harvest is running later than usual. Mid-season and late crop prospects appear good. Of the major producing States, only California and Michigan are showing a reduction in acreage. Alabama and Ohio are showing no acreage change. All others indicate increases ranging from 2 percent for New Jersey to 16 percent for Connecticut.

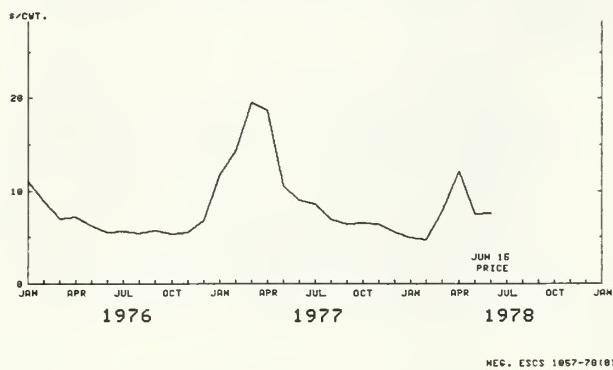
Prices to growers from January through April have been slightly above last year's levels. In May, prices dropped below those of a year earlier, but June advanced sharply as normal supply patterns were interrupted. With a 3-percent greater acreage, summer prices will probably remain near last year's levels.

Lettuce

Acreage of lettuce for harvest during the summer quarter is estimated at 50,400 acres, 2 percent above the acreage harvested a year earlier. Based on average yields, production will be about 1 percent below last year.

plagued with seed stems and hail damage. Some acreage was lost in Arizona because of hail damage and heat. New Jersey areas have suffered from excessive rainfall and hail. Crop development in Washington was behind schedule. Acreage in major onion storage States is estimated at 50,200 acres or 4.8 percent more than in 1977. Acreage at this level, plus average yields, would suggest lower prices from now to the end of the year.

ONIONS : U.S. GROWER PRICES



Cantaloups and Honeydews

The 1978 summer cantaloup acreage is estimated at 51,200, 18 percent above last year. Production is also expected to increase 18 percent over that of 1977. A sharply larger California acreage is responsible for most of this change, but there are gains in Arizona and Georgia too. Of the important producers, only Texas reduced its acreage this year.

Summer acreage of honeydews is estimated at 12,900 acres, or 37 percent more than in 1977. Production is expected to be about 38 percent above last year. Both Arizona and California are showing increases in acreage and potential output.

Watermelons

Watermelon acreage during the summer quarter of 1978 is estimated at 113,700 acres, about the same as last year. Based on average yields, the summer crop is estimated to be slightly smaller than a year earlier.

Because the spring crop was about 4 percent smaller and later than a year earlier, f.o.b. shipping point prices in May and June have fluctuated above last year's levels. With a smaller supply in prospect for the summer months, prices are expected to continue to average higher than a year earlier.

PROCESSED VEGETABLES

Setting the Stage for 1978/79

The sharply larger supply of most canned tomato products, and corn to a lesser extent, tended to hold down average prices for canned vegetables during the 1977/78 season. Most other canned vegetables were in moderate supply, except for that large pack of sweet corn.

The ESCS index of canners' wholesale prices in June was 170.3 (1967=100), 3 percent less than a year earlier. Although the 1977 pack of frozen vegetables, excluding potatoes, was the largest of record, the total supply available generally was not burdensome, and most wholesale prices advanced as the season progressed. The current stock position of most processed vegetables is moderate, but tomatoes and tomato products are conspicuous exceptions.

Growers and processors decreased their acreage of major processing vegetables by 1 percent this year. A 13-percent decline in contract tomato acreage and a 3-percent cut in corn was not offset by increases for other crops. If average yields are realized, the total contract tonnage will be moderately less this year because tomatoes comprise nearly 60 percent of the tonnage produced. In turn,

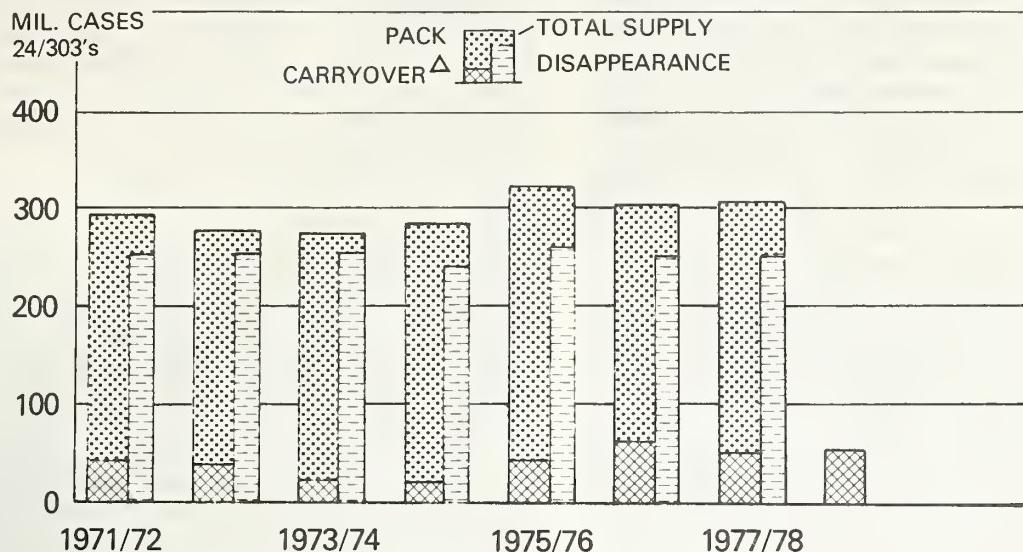
Table 2—Vegetables for processing: Planted acreage, annual 1977 and 1978¹

Crop	Planted acreage		
	Contract 1977	Contract 1978	1978 as Percent Of 1977
--- 1,000 acres ---			
Snap beans	260.2	277.2	107
Green peas	379.7	393.1	104
Spinach (winter and spring) . . .	19.8	19.9	100
Green lima beans	62.9	70.4	112
Beets	16.0	18.6	116
Sweet corn	481.2	465.6	97
Cucumbers for pickles	107.2	114.5	107
Tomatoes	343.9	298.2	87
Total ²	1,671.0	1,657.5	99
For freezing:			
Green lima beans	39.4	42.9	109
Snap beans	57.7	67.9	118
Sweet corn	137.1	134.2	98
Green peas	145.1	145.9	101
For canning:			
Green lima beans	23.5	27.5	117
Snap beans	202.5	209.2	103
Sweet corn	344.1	331.5	96
Green peas	234.6	247.1	105

¹ 1978 production for canning and freezing will be published in December annual summary. ² May not add to total due to rounding.

Data from Vegetables-Processing, ESCS, USDA.

TOTAL SUPPLY AND DISAPPEARANCE OF SEVEN CANNED VEGETABLES *

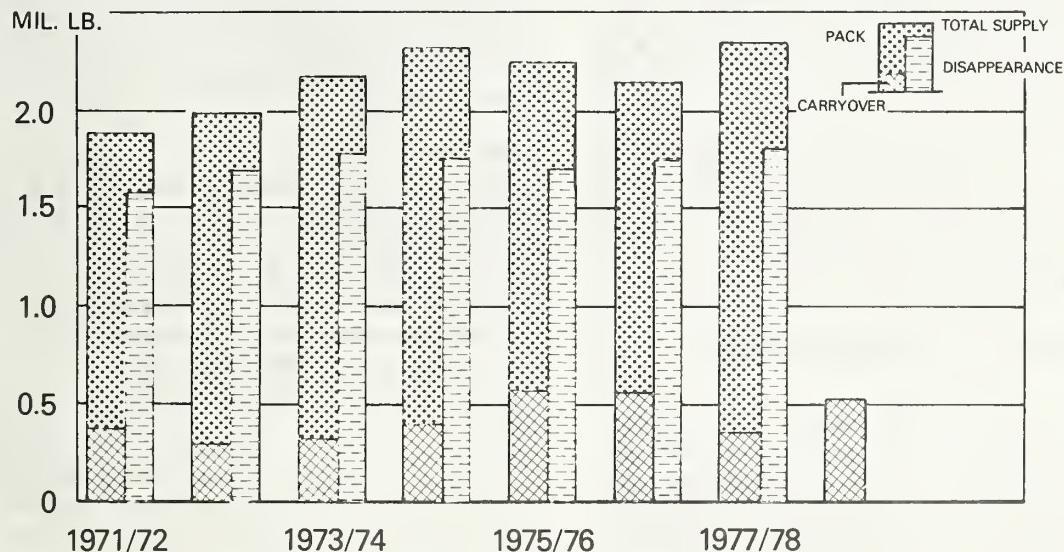


* LIMA BEANS, SNAP BEANS, BEETS, SAUERKRAUT, SWEET CORN, GREEN PEAS AND CERTAIN TOMATO PRODUCTS.
△ CANNERS' CARRYOVER - DISTRIBUTORS' STOCKS EXCLUDED.

USDA

NEG. ESCS 814-78 (8)

TOTAL SUPPLY AND DISAPPEARANCE OF SEVEN FROZEN VEGETABLES *



* LIMA BEANS, SNAP BEANS, SWEET CORN, GREEN PEAS, SPINACH, BROCCOLI AND CARROTS.

USDA

NEG. ESCS 813-78 (8)

this suggests a smaller 1978/79 supply of canned vegetables at moderately higher prices, because the larger carryover cannot be expected to offset the smaller pack to be made this summer and fall.

If tomatoes are eliminated from consideration, a somewhat different supply picture emerges. This leaves the canned and frozen items which compete freely with each other such as snap beans, peas, corn, carrots, and broccoli. Here, the 1978/79 picture is likely to be one of slightly larger supplies because many canned and frozen packs stand a good chance of being slightly larger. The combined carryover of these canned vegetables is slightly below that of a year earlier, while the carryover of frozen vegetables is substantially larger.

The expected moderate increases in pack would not readily exert appreciable downward price pressure in view of sharply increased costs of processing in 1978. For example, tinplate costs have risen about 18 percent this year, the sharpest rise in recent history. A year earlier, the year-to-year rise was only about 7 percent. Also, wage rates in food canning were up 9 percent between April 1977 and April 1978 according to Bureau of Labor Statistics Employment and Earnings reports.

Cold wet weather delayed planting in several areas this year. This season did get off to a rather slow start, because rain-soaked fields delayed the planting of the California tomato crop. Washington was slow in getting all the intended pea acreage seeded, and planting of all the processing crops in the Midwest was delayed by the cool wet spring. However, in all areas, crop progress has been good, and, as in most other years when a late start is made, the season has tended to move closer to a more normal growing and harvest pattern.

In brief, looking to 1978/79 it appears likely that canned vegetable prices will advance further, as tomato supplies recede from their current oversupply position. Higher wage, tinplate, and packaging costs will likely be at least partially passed on to consumers, so that nearly all canned and frozen vegetable prices will be higher. The acreage increases are small, and it does not appear likely that burdensome supplies are going to result from 1978 packing activity.

Prospects for Leading Vegetables

Snap Beans

Acreage planted to snap beans for canning is again larger this year, this time 3 percent more than in 1977. Near average yields would suggest a supply for 1978/79 being moderately larger than recent past experience. Disappearance slowed some the past season because supplies were somewhat restricted, and for the coming season supplies are likely to be large enough to permit increased use.

Wholesale prices for nearly all cuts and can sizes are slightly to moderately higher than a year earlier. However, with more generous supplies expected, future price gains may come slower for this commodity.

Although frozen snap bean stocks on July 1 were more than an eighth larger than last year, the quantity held is relatively small. Freezers plan to pack from a 9-percent larger contract acreage this year. Current wholesale prices are firm at levels moderately higher than a year earlier.

Peas

The carryover of old pack peas was relatively small, but this was achieved at some price sacrifice as most items have been selling for slightly to moderately less than a year earlier. Nevertheless, canners have contracted for 5 percent more acreage this season. An increase of this size, coupled with average yields (not as large as 1977), would mean a total supply still slightly smaller than a year earlier. This would suggest higher prices this fall and winter, especially in view of the increased costs of making the new pack. By early July, canning activity was in high gear in the Midwest, with average yields reported except for the earliest fields harvested which turned out something less.

The acreage of peas contracted for freezing is only 1 percent larger than the 145,140-acre figure of last year. With the June 1 carryover of 90 million pounds, the smallest in years, it is possible that a tight market for this item could be developing between now and the end of the 1978/79 market season. However, disappearance dropped to 345 million pounds, the smallest use in years. Even so, it is likely that wholesale prices will be firm to stronger the next few months. As of early July, harvest progress was slow, though there is no cause for concern at this time.

Sweet Corn

Growers and canners contracted for 4 percent less acreage this year in view of the need to retrench moderately, but movement has perked up sharply in recent weeks, as buyers eye the higher cost 1978 pack. The 1977/78 supply was a large one, with recent prices for consumer size packs and styles close to, or slightly lower than, a year earlier. Quotations for 6/10's were the same or slightly higher than a year earlier, as of June. With average yields, the 1978 pack would probably reduce the 1978/79 supply by about 3 to 4 million cases (24/303's basis), leaving a figure of about 62 million cases. This may be expected to lend strength to prices this coming season.

Despite a 2-percent cut in contracted acreage for freezing, larger carryover stocks of frozen corn-on-

cob would suggest about the same or barely larger combined supplies of frozen corn this fall. Since the early 1970's, the market for on-cob frozen corn has more than doubled while the disappearance of cut has remained relatively steady, holding in the 240- to 250-million-pound range annually. When cut supplies were heavy in 1976/77, seasonal movement was higher.

Tomatoes

Contract tomato acreage is substantially less this season, as California packers moved to reduce the current heavy supplies of finished goods which have held down wholesale prices the past market season. Acreage under contract in California is 15 percent less this year, and only in recent days was agreement reached on prices to be paid for this season. Early signing processors have agreed to a \$54 per ton base price which is \$1 less than a year ago. There are early and late season delivery incentive premiums, a premium of \$1 per ton for bin delivery, along with some changes in inspection procedure. In California, plantings were delayed by wet weather during March and April. This means that heaviest harvest activity will be occurring later than usual, thus exposing more of the crop to the risk of early fall rains. Nevertheless, growing conditions have been nearly ideal, and if the rains hold off until some time in October, there is a good chance a better balance between supply and demand for tomato products will have been achieved for 1978/79.

The industry is anticipating tighter supplies this fall, since prices for canned tomatoes have advanced in recent weeks. On the other hand, prices for catsup, paste, and puree have held steady. This may reflect the thinking that with more raw tonnage coming a little later than usual, the 1978 pack will, by necessity, run heavier to the concentrated products.

Preliminary annual per capita use data for 1977 show that tomato juice regained part of its recent sharp drop to below 3 pounds per person. The figure now stands at 3.1 pounds for 1977. Canned tomato use at 5 pounds per person is off slightly, but this figure has changed little since the middle 1960's. The demand for concentrates has been the growth area in the tomato business. The alltime high of 13.6 pounds—product weight basis—was reached in 1977.

Asparagus

Frozen asparagus stocks on July 1 were only 11.5 million pounds, slightly more than half the modest supply on hand a year earlier on the same date. The American Frozen Food Institute reported that the preliminary pack in California to May 31

was only 5 million pounds. For all of last year, California packed 14.6 million. Fresh market activity reduced supplies available for processors in that State. In Michigan, freezers and canners both expect to make larger packs, although lack of moisture is holding down the increased supply of raw product. As of mid-June, Michigan growers delivered 16.6 million pounds, compared with 17.4 for all of last year. Trade reports from Washington indicate smaller tonnage available this year. As a result of these restricted supplies, freezers' and canners' wholesale prices are sharply higher again this year.

Other Processing Vegetable Highlights

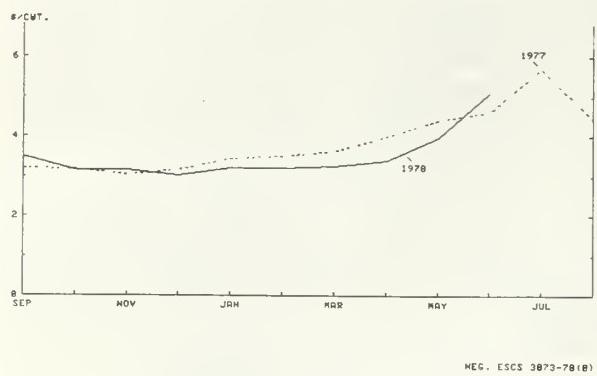
The contracted tonnage of *cabbage for sauerkraut* is 6 percent larger than a year earlier. Even with a smaller carryover expected, this 1978 tonnage would raise slightly the total supply available this fall and winter. Contracted spring and summer *pickling cucumber* acreage is 7 percent larger than a year ago. Open market purchases could be expected to add about 10 percent additional supply, based on past recent history. Also, there is a larger acreage of *lima beans* contracted for both canning and freezing this year. In view of relatively small carryover, some increased tonnage is needed to maintain supplies for 1978/79. With trade movement of *canned beets* fairly good, and a relatively low carryover in prospect, contract acreage is 16 percent larger this season. At this time, the institutional size pack is very scarce, but by early August, new supplies will likely be available.

The California *broccoli* pack this season through May was 101 million pounds, 29 percent smaller than a year earlier. This represents a supply adjustment to correct a heavy carryover situation.

POTATOES

U.S. spring potato production was only 18 million cwt., the smallest crop on record. Most of the reduction came from Kern County, California, where average yields were cut sharply by excessive winter rains which interfered with planting and growing conditions. The total 1978 spring crop was 21 percent smaller than the light 1977 crop. As this sharp cut in output occurred when storage supplies from Northern States were running low, prices advanced rapidly during June. North Carolina round whites were bringing \$8.45 to \$10.25 per cwt. early in July compared with \$6.00 a year earlier. Early July quotes of the same type of potato from the Eastern shore of Virginia moderated to about \$8.00, moving to \$5.00 late in the month. The

POTATOES : U.S. GROWER PRICES



smaller California spring crop gave a major lift to late season Idaho sales. Prices for the premium pack of count boxes advanced \$14.00 to \$15.00 per cwt. equivalent, a record high price. The nonsize A pack in consumer sizes advanced too, though not to the same extent. The reduced supply of long whites from California and short crops elsewhere kept prices in the \$8.75 to \$10.00 range during June and early July.

Summer potato production of 21.2 million cwt., 4 percent less than a year earlier, is one of the smallest crops since 1975. This suggests prices higher than a year earlier this summer. But relatively large quantities of Norgold Russets from the Pacific Northwest, classed as fall potatoes, are moving to market now. This could alter the summer price prospect.

Many producing areas, especially those on the eastern seaboard, began harvest a week or two later than normal this year. And with a smaller supply to market, it is likely that there will be a minimal quantity held over to compete with the important fall crop to be harvested beginning in early September. This would provide some "lift" for the early fall market.

There are other price-influencing factors to consider in assessing the grower market price this fall. The April intentions report noted only a 1-percent decline in acreage expected to be planted. The August Crop Report will provide the first clue as to whether this turned out to be the case. Trade observations on certain States have come up mixed—i.e., Oregon moderately more than intentions, but Idaho and the Red River Valley slightly less, for example. On balance, the U.S. planted acreage figure may turn out little different from the early reported intentions. This would be a "bearish" price factor, viewing it from the grower's standpoint.

Processor demand this fall may be expected to continue reasonably strong, about the same as for the season now ending. Stocks of frozen potato products on July 1 were 956 million pounds, 8 percent more than on the comparable date a year earlier. This larger figure may be regarded as having a minimal effect on demand for raw product this fall, because use of frozen products continues its long-term expansion. On the other hand, the demand for flakes and granules may be expected to hold relatively weak, not varying greatly from the 1977 pattern.

Chip usage in 1978/79 can be expected to reflect the same turn taken by the entire economy. If purchasing power holds up, some moderate increase in chip use could develop.

Total processing demand is now expected to exert a stabilizing influence on fall potato prices with the prospect of about the same or slightly more potatoes going for the various processing uses in 1978/79 and with the prospect of a fall crop close to, but probably no more than, a year earlier.

Export Activity Little More Than Routine

For the period of September 1977 through May of this year, less than 1.7 million cwt. of fresh

Table 3—Potatoes, Irish: Acreage, yield per acre, and production, annual 1976, 1977, and indicated 1978

Season group	Acreage		Yield per acre			Production		
	Harvested		For harvest 1978	1976	1977 ¹	Indicated 1978	1976	1977 ¹
	1976	1977 ¹						
--- 1,000 acres ---								
Winter	14.4	13.4	12.6	207	199	220	2.98	2.66
Spring	98.4	91.4	90.7	251	250	199	24.72	22.87
Summer	118.7	115.2	112.7	190	191	188	22.54	21.98
Total with production to date	231.5	220.0	216.0	217	216	194	50.24	47.51
								41.97

¹ Revised.

Crop production, ESCS, USDA, issued monthly.

Potato exports²

Crop year Sep.-Aug.	Dehy- drated	Fresh	Total	Percent of crop
--- Mil. cwt. ---				
1973/74 ..	2.3	5.6	7.9	3%
1974/75 ..	1.7	3.6	5.3	2%
1975/76 ..	10.0	10.0	20.0	6%
1976/77 ..	20.5	11.0	31.5	9%
1977/78 ..	4.4	1.7	6.1	2%

¹Fresh weight basis. ²These data may vary slightly from other USDA reports, since this table is based on a U.S. September through August Crop year. ³Sept. thru May.

stock moved to foreign markets. This is more or less on a par with 1974 and earlier crop years. A similar pattern for fresh exports in 1978/79 may be expected, although nothing on the order of 1975 or 1976 is foreseen at this time.

Dehydrated potato exports fell sharply this season, though they will turn out to be somewhat higher than other years before the European shortage periods. Manufacturers of flakes and granules are keenly interested in developing new export outlets, and it is possible some further gains can be made, even for 1978/79. These products are now approved for export sales under terms of the Commodity Credit Corporation Export Sales Program.

SWEET POTATOES

Acreage of sweet potatoes for harvest this year is 119,500, up 6 percent from a year earlier. Accounting for most of this increase is the substantial gain in North Carolina's crop this year. Louisiana acreage is the same as in 1977. These two States account for 54 percent of all acreage for harvest. Elsewhere, changes are small, but pluses do exceed minuses. Except for the late start in some sections, crop conditions are generally favorable in all major producing areas.

Canners' stocks of sweet potatoes on April 1 were 1.8 million cases, the smallest supply in

Table 4—Sweetpotatoes: Harvested acreage by States, United States

State and area	1976	1977	Indi- cated 1978 ¹	1978 as percent- age of 1977
--- 1,000 acres ---				
New Jersey	2.3	2.4	2.7	113
Maryland	1.6	1.6	1.4	88
Virginia	6.5	5.6	6.1	109
Central Atlantic ..	10.4	9.6	10.2	106
North Carolina	33.0	33.0	37.0	112
South Carolina	2.5	2.3	2.2	96
Georgia	5.9	5.5	6.0	109
Lower Atlantic ..	41.4	40.8	45.2	111
Tennessee	2.9	2.8	2.8	100
Alabama	5.5	5.3	5.5	104
Mississippi	9.0	8.0	9.0	113
Arkansas	1.5	1.6	1.8	113
Louisiana	29.0	27.0	27.0	100
Texas	10.5	9.5	9.5	100
Central	58.4	54.2	55.6	102
California	7.6	7.8	8.5	109
United States ...	117.8	112.4	119.5	106

¹Indicated as of June 30.

Data from Acreage, ESCS, USDA.

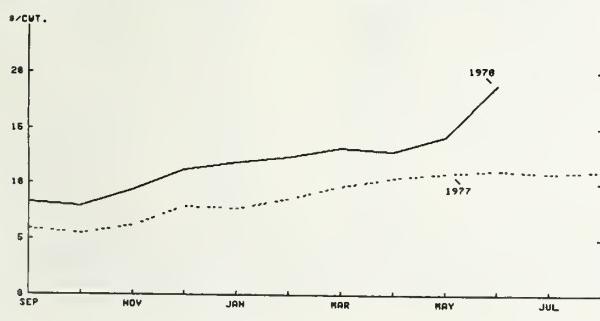
years. Lighter than usual supplies have held down movement, and at the present time there are practically no spot supplies available. Under these conditions, packing activity can be expected to get underway as early as possible, and an active canning season is in prospect this year.

The outlook for grower prices this fall seems good despite the larger production expected. Prices to growers each month of the 1977/78 season were at record highs. For 1978/79, lower prices are of course likely, though by recent historical standards they will likely hold higher than most other recent seasons.

MUSHROOMS

Prices received by growers for mushrooms for domestic processing ended the season once more on the up side. Prices for clean-cut stock held at 68 to 70 cents a pound from the beginning of March to the end of May. This was 3 cents a pound higher than for the ending months of the previous season. Fresh market prices also averaged higher than a year ago—72 to 74 cents/lb. versus 68 to 70 cents/lb. a year earlier. These quotations are the last reports from the Pennsylvania Department of Agriculture. Price reporting will again resume the end of October.

SWEETPOTATOES : U.S. GROWER PRICES



HEC-ESCS 3874-78(6)

For this summer, most production will be going to fresh market outlets, and prices to growers are expected to remain firm to strong. It appears that fresh use of domestic mushroom production will have moderate to substantial gains between July 1, 1977 and July 1, 1978.

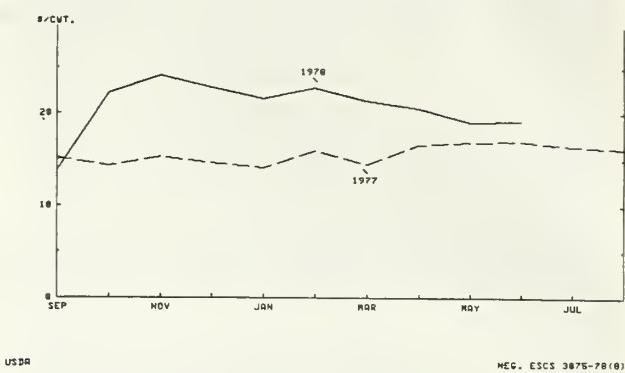
The International Trade Commission, in monitoring import competition in the domestic processed mushroom market, noted that domestic canning activity between July 1, 1977 and March 31, 1978 declined to 67,743,000 pounds, 7 percent less than during the comparable period a year earlier. However, imports in the same period, principally from Taiwan and Korea, increased to 61,632,000, 17 percent above the comparable 9-month period of 1976/77. This gain in total supply of canned product pushed total sales of canned mushrooms to 136 million pounds for 9 months. Included in this figure are 2 to 3 million pounds of frozen mushrooms. But with the import share moving up to 45 percent of all processed consumption, the domestic industry is again showing concern.

DRY EDIBLE BEANS

The U.S. acreage for harvest of dry beans is 1.46 million acres. This is 16 percent more than in 1977 but 3 percent less than in 1976. All reporting States planted more beans than in 1977. Earlier, however, growers in Nebraska and North Dakota had indicated that they would plant the same acreage of beans as in 1977.

Average bean prices received by growers at the beginning of the current market season, with the

DRY BEANS : U.S. GROWER PRICES



USDA REC-ESCS 3875-7B(8)

exceptions of the months of September and October, were the highest since 1973. The 1977 acreage was the smallest since 1967 and the production the smallest since 1973. Starting with October, average grower prices were above \$20 per cwt. through April, dropping to \$19 during May and June.

Domestic use has been of a routine character and export activity has been moderately heavier—largely due to a 3-fold increase in navy bean exports—than last year, even though production was about a tenth smaller. Exports of dry beans, excluding seed, from September through May were 3.2 million cwt. compared with 3.0 million cwt. in 1976/77.

By Classes—Navy Beans

Because navy beans dominate Michigan bean production, a 14-percent larger acreage for harvest in that State implies a substantially larger crop of

Table 5—Beans, dry edible: Acreage, yield per acre, and production, annual 1976, 1977, and indicated 1978¹

Group State and classes	Acreage			Production ²		
	Harvested		For harvest 1978 ³	1976	1977	Indicated 1978 ³
	1976	1977				
--- 1,000 acres ---						
Michigan	545	480	545	5,450	5,520	(⁷)
New York	37	32	43	396	352	(⁷)
Northwest ⁴	520	416	479	7,169	6,031	(⁷)
Southwest ⁵	210	163	194	1,866	1,409	(⁷)
--- 1,000 cwt. ---						
California:						
Large Lima	35	31	30	522	523	(⁷)
Baby Lima	21	22	23	378	460	(⁷)
Other	123	113	147	1,900	1,943	(⁷)
Total California	179	166	200	2,800	2,926	(⁷)
Other States ⁶	8	6	—	105	50	—
United States	1,499	1,263	1,461	17,786	16,288	(⁷)

¹ Includes beans grown for seed. ² Cleaned basis. ³ Indicated as of June 30. ⁴ Nebraska, Montana, Idaho, Wyoming, Washington, Minnesota, and North Dakota. ⁵ Kansas, Colorado, New Mexico, and Utah. ⁶ Discontinued after 1977. ⁷ Available in August Crop Production.

Data from Acreage, ESCS, USDA.

navy beans this fall assuming average yields. Last year's rain-damaged harvest was a big disappointment, and a near disaster in neighboring Ontario. Despite this problem, Michigan export sales September 1977 to May have been brisk, nearly 3 times what they were a year earlier, as Canadians were unable to fill their normal export demand. Nonetheless, prices have been trending slowly downward since last December, moving from \$28.00 to 17.75 in mid-July. Much of this decline came after April when 1978 planting plans became more apparent, and export trade slackened. The largest importers of Navy beans thus far this year have been the United Kingdom, followed by Canada, Netherlands, Italy, Belgium, and France.

Great Northerns

In a much similar fashion, prices of great northerns at Idaho and Nebraska have been trending downward since last December from \$25.00 to \$20.00 by mid-July. Production was 20 percent less in 1977 and exports from September 1977 through May 1978 were off 28 percent from a year earlier. Algeria, France, Spain, Iran, and Tunisia have been large importers in 1977/78.

Pintos

As with Navy beans and Great Northerns, prices of pinto beans at Colorado points have been trending downward since December from \$28.00 to \$17.60 by mid-July. Export sales from September 1977 through May 1978 have been nearly 40 percent below those of the previous year.

The Dominican Republic, Mexico, and Japan have been the largest importers of U.S. pinto beans thus far in 1977/78.

According to trade reports, a substantial carry-over of old beans is expected at the end of this season.

The Outlook

The price and supply picture for dry beans at this time suggests further price erosion to growers of major classes. This assumption is based on the 1978 prospective plantings which call for 6 percent more acreage this year. Acreage to be harvested is 16 percent more. Although overall exports of dry beans had been more favorable in 1977-78 than a year earlier, they were largely due to the nearly 3-fold increase in navy bean exports. But for 1978/79, navy bean exports may slacken as Canada may be in the export market in the more usual pattern.

Navy beans, however, were showing price decline trends through the 1977-78 marketing season similar to Great Northerns and pintos, which had a substantial decrease in exports during that season.

In California, where many different classes of beans are grown, the price picture is likely to be even more gloomy. In that State, where limas, blackeyes, and garbanzos are important, and with prices considerably below earlier levels for these classes, further price declines may be expected because of large acreages planted to some of these classes. With all reporting dry bean producing States showing increases in acreage for harvest, barring unfavorable weather, prices for major U.S. classes may be expected to average considerably lower at least for the early part of the 1978/79 marketing season.

DRY EDIBLE PEAS AND LENTILS

Growers in Idaho and Washington expect plantings of 203,000 acres of dry peas this season, an increase of 17 percent over last year. Both States have planted more, and crop progress has been

Table 6—Peas, dry field: Acreage, planted and harvested, annual 1976, 1977, and acreage for harvest 1978¹

State	Acreage					
	Planted			Harvested		
	1976	1977	1978	1976	1977	For harvest 1978
----- 1,000 acres -----						
Idaho	50	68	77	48	67	76
Washington	80	105	126	77	100	121
United States	130	173	203	125	167	197

¹ Excludes peas grown for seed.

Data from Acreage, ESCS, USDA.

good, although rains have extended the planting period somewhat later than usual. Under these satisfactory moisture conditions, the crop looks very good. The only problem seems to be a heavier than usual insect infestation which can be controlled, but at some expense. The presence of these insects could cause some yield reduction later on. The planted acreages of lentils is larger this year, with 134,000 planted in these two States. This compares with 120,000 in 1977.

Despite smaller supplies, the Pacific Northwest Pea Dealer's Association reported that domestic movement of peas increased by about 15 percent between September and June 1, comparing the two most recent market seasons. Domestic lentil movement was, however, off by 20 percent.

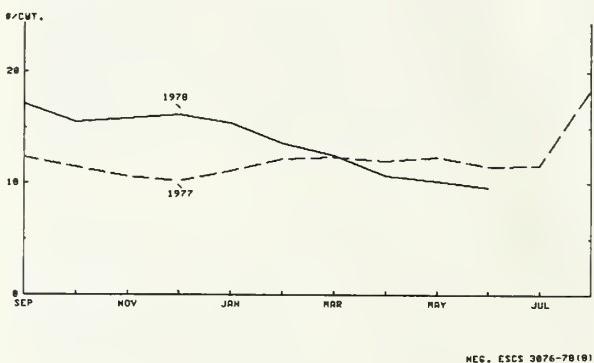
With short supplies on hand in 1977/78, the export trade in dry peas fell sharply. Between September 1, 1977 and June 1, 1978, exports excluding seed were just shy of 600,000 cwt. This compared with roughly 1,430,000 cwt. for the comparable period a year earlier. Foreign movement of lentils was only a shadow of that of a year earlier—86,000 cwt. versus 750,000 in the earlier period.

The 1977/78 market season was an unusual one because the 1977 crop was so short. Growers held for higher prices for both peas and lentils, and for the first half of the marketing season, prices were at the highest levels since 1973/74. As the season progressed prices weakened, and when it became apparent that a larger 1978 crop was in prospect, further weakness developed.

Grower prices for peas moved progressively downward from \$16.10 per cwt. in December 1977 to \$9.60 in June 1978. This demonstrated buyer resistance despite the short supply. Lentils were the "high flyers" last November at \$43, but in mid-July were quoted at \$17.10 per cwt.

The price outlook this fall is predicated on a generous crop for which the markets have already partly discounted. Growers can be expected to hold and store in the face of any further possible weakness. As usual, the strength of export demand will be the major factor determining how much lower monthly prices will be relative to a year earlier. For lentils in particular, there is the need to refill domestic pipelines of distribution, and this can be expected to buoy price levels for a time, at least.

DRY PEAS : U.S. GROWER PRICES



REC. ESCS 3076-78(8)

Table 7—Commercially produced vegetables: Civilian per capita consumption, averages 1947-49,
1957-59, and 1965 to date

Period	Fresh equivalent						As percentage of annual total		
	Total fresh and processed	Fresh ¹	Processed ²			Fresh	Processed		
			Total	Canned	Frozen		Total	Canned	Frozen
----- Pounds -----									
1947-49	199.7	120.5	79.2	72.6	6.6	60.3	39.7	36.4	3.3
1957-59	199.7	104.1	95.6	81.1	14.5	52.1	47.9	40.6	7.3
Year									
1965	201.0	98.3	102.7	85.3	17.4	48.9	51.1	42.4	8.7
1966	201.5	95.9	105.6	86.7	18.9	47.6	52.4	43.0	9.4
1967	209.4	98.2	111.2	91.3	19.9	46.9	53.1	43.6	9.5
1968	214.9	101.2	113.7	92.7	21.0	47.1	52.9	43.1	9.8
1969	213.1	98.9	114.2	94.9	19.3	46.4	53.6	44.5	9.1
1970	213.4	98.8	114.6	94.0	20.6	46.3	53.7	44.0	9.7
1971	212.3	98.5	113.8	93.6	20.2	46.4	53.6	44.1	9.5
1972	216.0	99.3	116.7	96.3	20.4	46.0	54.0	44.6	9.4
1973	224.1	100.6	123.5	101.6	21.9	44.9	55.1	45.3	9.8
1974	224.6	102.8	121.8	100.9	20.9	45.8	54.2	44.9	9.3
1975	223.6	102.0	121.6	101.8	19.8	45.6	54.4	45.5	8.9
1976	226.2	102.7	123.5	103.0	20.5	45.4	54.6	45.5	9.1
1977 ³	226.9	101.2	125.7	104.7	21.0	44.6	55.4	46.1	9.3

¹ Includes dehydrated onions and excludes melons. ² Data includes pickles and sauerkraut in bulk; excludes canned and frozen potatoes, canned sweetpotatoes, canned baby foods and canned soups. ³ Preliminary.

Table 8—Potatoes, sweetpotatoes, dry edible beans, and dry field peas: Per capita consumption, primary distribution weight, averages 1947-49, 1957-59 and annual 1965 to date¹

Period	Potatoes ²	Sweet-potatoes ³	Dry edible beans ⁴	Dry field peas ⁵
Pounds				
1947-49	114	13.0	6.7	0.6
1957-59	107	8.3	7.7	.6
Year				
1965	108	6.2	6.6	.4
1966	118	6.3	6.3	.4
1967	108	5.8	6.9	.2
1968	115	5.7	6.4	.3
1969	117	5.6	6.9	.3
1970	118	5.5	5.9	.3
1971	119	4.8	5.9	.3
1972	119	5.0	6.3	.3
1973	117	4.9	6.4	.5
1974	114	5.3	6.7	.4
1975	122	5.4	6.5	.4
1976	116	5.3	6.3	.4
1977 ⁶	124	4.9	6.0	.2

¹ Civilian consumption only. ² Farm weight basis, calendar years. Includes farm garden produce but not nonfarm. Includes table-stock and processed potatoes. ³ Includes canned sweetpotatoes. ⁴ Cleaned basis, calendar years. ⁵ Cleaned basis, crop years beginning approximately September of year indicated. ⁶ Preliminary.

CHANGES IN VEGETABLE CONSUMPTION PER CAPITA BETWEEN 1970-72 AND 1975-77 *

TOTAL LB. 1975-77

102.0 FRESH

3%

103.2 CANNED

9%

20.4 FROZEN

NO CHANGE

225.6 TOTAL

5%

* FRESH WEIGHT BASIS; EXCLUDES POTATOES, SWEET POTATOES AND MELONS. DEHYDRATED ONIONS INCLUDED IN FRESH.

USDA

NEG. ESCS 634-78 (8)

CHANGES IN FRESH VEGETABLE CONSUMPTION PER CAPITA BETWEEN 1970-72 AND 1975-77

TOTAL LB. 1975-77

24.6 LETTUCE[△]

6%

12.4 TOMATOES

3%

7.9 SWEET CORN

1%

8.8

-1%

CABBAGE

12.7

-2%

ONIONS*

6.2

CARROTS

NO CHANGE

[△] INCLUDES ESCAROLE

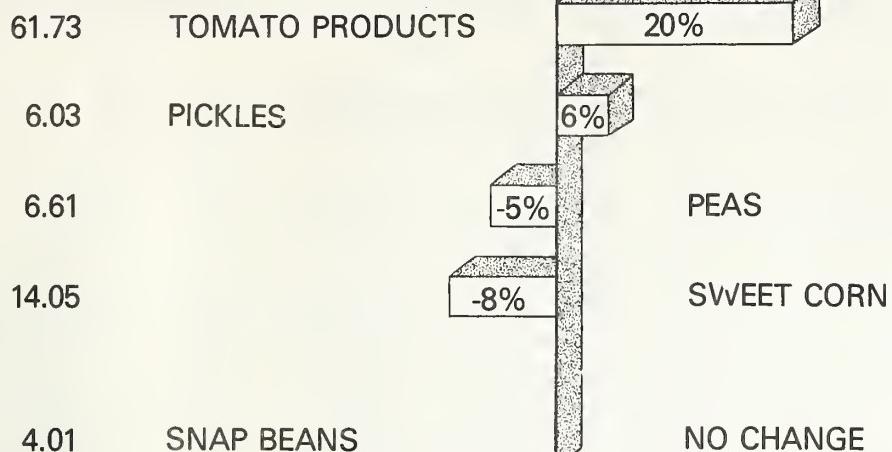
* INCLUDES ABOUT 3 LB. OF DEHYDRATED ONIONS.

USDA

NEG. ESCS 8866-78 (8)

CHANGES IN CANNED VEGETABLE CONSUMPTION PER CAPITA BETWEEN 1970-72 AND 1975-77*

TOTAL LB. 1975-77



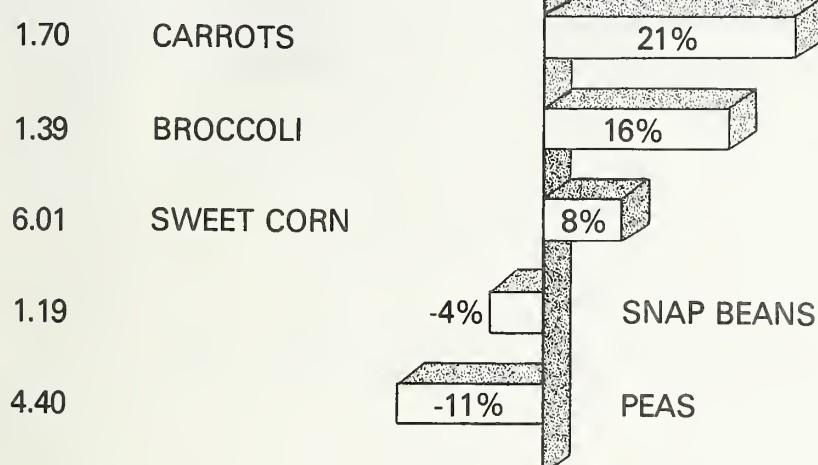
* FRESH WEIGHT BASIS.

USDA

NEG. ESCS 8875-78 (8)

CHANGES IN FROZEN VEGETABLE CONSUMPTION PER CAPITA BETWEEN 1970-72 AND 1975-77

TOTAL LB. 1975-77



* FRESH WEIGHT EQUIVALENT.

USDA

NEG. ESCS 8874-78 (8)

Table 9—Civilian per capita consumption of selected commercially produced fresh and processed vegetables¹
United States, calendar years 1966-77

Commodity	Fresh equivalent basis											
	1966	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977 ²
----- Pounds -----												
Asparagus												
Fresh .....	.40	.40	.50	.40	.50	.40	.50	.40	.40	.40	.40	.30
Canned .....	.83	.80	.87	.83	.81	.73	.70	.84	.62	.64	.67	.48
Frozen .....	.30	.32	.30	.28	.28	.24	.19	.21	.19	.17	.21	.17
Beans, lima ³												
Fresh .....	.30	.30	---	---	---	---	---	---	---	---	---	---
Canned .....	.31	.43	.46	.52	.54	.50	.44	.44	.42	.37	.41	.60
Frozen	1.47	1.53	1.56	1.33	1.50	1.35	1.45	1.46	1.32	1.14	1.00	1.12
Beans, snap												
Fresh	1.90	2.00	1.90	1.80	1.70	1.60	1.60	1.60	1.50	1.60	1.60	1.50
Canned	3.50	3.54	3.76	3.91	3.98	4.01	3.99	4.03	4.06	3.84	4.13	4.05
Frozen	1.24	1.07	1.18	1.14	1.24	1.22	1.26	1.34	1.27	1.04	1.35	1.18
Broccoli												
Fresh .....	.30	.30	.40	.40	.50	.70	.70	.80	.80	1.00	1.10	1.30
Frozen .....	.95	1.03	1.05	1.11	1.10	1.19	1.32	1.41	1.38	1.27	1.38	1.53
Cabbage												
Fresh	8.90	9.10	9.30	8.90	8.80	9.20	8.80	9.00	9.10	9.20	8.80	8.50
Canned ⁴	2.21	2.23	2.56	2.30	2.37	2.47	2.19	2.19	2.40	2.11	2.24	2.18
Corn ⁵												
Fresh	7.40	8.00	7.80	8.00	7.90	7.50	7.90	8.00	7.70	7.90	8.20	7.60
Canned	12.95	13.22	14.19	15.08	14.66	15.18	15.98	15.79	14.84	12.58	14.15	15.43
Frozen	4.64	5.93	5.87	5.35	5.96	5.41	5.41	5.88	5.78	5.69	5.77	6.56
Cucumbers												
Fresh	3.00	3.10	2.90	3.20	3.20	3.10	3.30	3.00	3.40	3.20	3.70	4.00
Canned ⁶	4.95	5.42	5.74	5.76	5.50	5.65	5.83	5.93	5.79	5.83	6.24	6.01
Peas, green ³												
Fresh .....	.20	.10	---	---	---	---	---	---	---	---	---	---
Canned	7.58	7.39	7.56	7.49	7.06	6.86	6.87	7.71	6.35	6.26	6.57	7.01
Frozen	5.58	5.10	5.66	4.86	5.04	4.92	4.92	4.80	4.74	4.64	4.42	4.14
Spinach												
Fresh .....	.60	.60	.60	.50	.50	.50	.40	.50	.50	.50	.60	.70
Canned .....	.55	.57	.65	.47	.62	.58	.64	.73	.69	.49	.47	.46
Frozen .....	.98	1.00	1.00	.96	.97	1.04	1.03	.96	1.13	.93	1.02	1.05
Tomatoes												
Fresh	12.40	12.40	11.90	11.90	12.30	11.40	12.20	12.60	12.00	12.10	12.70	12.50
Canned ⁷	47.59	51.00	50.42	51.30	51.30	50.39	51.96	56.17	57.84	62.45	61.15	61.58

¹ Data for processed vegetables excludes quantities consumed in commercially produced soups, and baby foods and in canned wholesale mixtures such as peas and carrots and succotash. ² Preliminary. ³ "In pod" basis. ⁴ Sauerkraut, canned and bulk. ⁵ "On-cob" basis. ⁶ Pickles, canned and bulk. ⁷ Including canned whole tomatoes and tomato products other than soup.

Table 10—Fresh vegetables and melons, commercial: Per capita consumption, farm weight,
averages 1947-49, 1957-59, and 1965 to date¹

Period	Vegetables												Total vege- tables and melons			
	Leafy, green and yellow															
	Tomatoes	Artichokes	Aspar- agus	Lima beans (un- shelled)	Snap beans	Bro- ccoli	Brussels sprouts	Cabbage	Carrots	Kale	Lettuce and escarole	Green peas (un- shelled)	Peppers	Spinach	Minor	
1947-49	13.8	.2	1.0	.6	4.1	.9	.2	16.1	8.8	.2	18.6	.9	2.1	1.9	6.3	61.9
1957-59	12.4	.2	.8	.3	2.7	.4	.1	10.6	7.3	.2	20.3	.3	2.2	1.0	5.2	51.6
Year																
1965	12.0	.3	.6	.3	2.0	.3	.1	8.9	7.0	.1	21.7	.2	2.3	.6	4.6	49.0
1966	12.4	.3	.4	.3	1.9	.4	.1	8.9	6.4	.1	21.6	.2	2.4	.6	4.0	47.4
1967	12.4	.4	.4	.3	2.0	.3	.1	9.1	6.5	.1	22.1	.1	2.6	.6	3.6	48.2
1968	11.9	.3	.5	.3	1.9	.4	.2	9.3	7.5	.3	22.5	.3	2.8	.6	5.5	51.3
1969	11.9	.3	.4	.3	1.8	.4	.2	8.9	6.0	.3	22.5	.3	2.6	.5	4.4	47.8
1970	12.3	.3	.5	.3	1.7	.5	.2	8.8	5.9	.3	23.1	.3	2.4	.5	4.7	48.4
1971	11.4	.4	.4	.3	1.6	.7	.2	9.2	6.1	.3	23.2	.3	2.5	.5	4.5	49.1
1972	12.2	.3	.5	.3	1.6	.7	.2	8.8	6.6	.3	23.3	.3	2.7	.4	4.6	49.5
1973	12.6	.3	.4	.3	1.6	.8	.2	9.0	6.7	.3	23.9	.3	2.8	.5	4.4	50.2
1974	12.0	.3	.4	.3	1.5	.8	.2	9.1	7.0	.3	24.5	.3	3.0	.5	4.3	51.4
1975	12.1	.3	.4	.3	1.6	1.0	.2	9.2	6.5	.3	24.5	.3	3.1	.5	4.3	51.4
1976	12.7	.4	.4	.3	1.6	1.1	.2	8.8	6.7	.3	24.3	.3	3.3	.6	3.7	50.9
1977 ⁴	12.5	.3	.3	.3	1.5	1.3	.2	8.5	5.4	.3	25.1	.3	3.4	.6	3.8	50.3
	Vegetables												Melons			Total vege- tables and melons
	Other												Total water- melons	Canta- loups	Total melons	Dehy- drated onions
	Beets	Cauli- flower ⁵	Celery	Corn	Cucum- bers	Egg plant	Garlic	Onions and shallots ⁶	Minor	Total	Pounds					
1947-49	1.3	3.3	8.2	8.0	2.6	.4	.2	12.0	8.8	44.8	120.5	17.8	9.6	27.4	147.9	
1957-59	.7	1.3	8.0	8.3	2.8	.4	.3	11.7	6.6	40.1	104.1	16.9	8.2	25.1	129.2	
Year																
1965	.5	1.0	6.7	8.1	3.1	.4	.4	11.4	5.7	37.3	98.3	15.7	7.9	23.6	121.9	
1966	.4	1.0	6.9	7.4	3.0	.4	.3	11.5	5.2	36.1	95.9	14.8	7.3	22.1	118.0	
1967	.4	1.0	6.8	8.0	3.1	.4	.4	12.1	5.4	37.6	98.2	14.2	8.1	22.3	120.5	
1968	.5	1.0	7.2	7.8	2.9	.4	.5	11.9	6.3	38.0	101.2	14.4	8.6	23.0	124.2	
1969	.9	1.3	7.3	8.0	3.2	.4	.5	12.5	6.4	39.2	98.9	13.8	9.1	22.9	121.8	
1970	.7	1.3	7.2	7.9	3.2	.4	.5	11.9	6.3	38.1	98.8	14.4	8.9	23.3	122.1	
1971	.7	1.3	7.5	7.1	3.1	.4	.3	10.1	6.1	35.5	96.0	14.1	8.5	22.6	118.6	
1972	.8	1.3	7.1	7.9	3.3	.5	.4	9.9	5.7	35.6	97.3	13.2	8.7	21.9	119.2	
1973	.8	1.3	7.6	8.0	3.0	.6	.5	9.2	5.7	35.4	98.2	13.8	8.0	21.8	120.0	
1974	.8	1.3	7.4	7.7	3.4	.5	.7	10.5	5.6	36.6	100.0	11.9	7.0	18.9	118.9	
1975	.9	1.0	7.0	7.9	3.2	.5	.8	9.8	5.4	35.5	99.0	12.2	6.9	19.1	118.1	
1976	1.0	1.0	7.5	8.2	3.7	.7	.5	10.1	5.1	36.8	100.4	13.5	7.0	20.5	120.9	
1977 ⁴	1.1	1.1	7.1	7.6	4.0	.6	.6	10.1	4.6	35.7	98.5	13.6	7.7	21.3	119.8	

¹ Excludes quantities produced in home gardens. ² Less than 0.05 pound. ³ Included in minor vegetables. ⁴ Preliminary. ⁵ Close trim basis since 1955; slight trim basis in prior years. ⁶ Includes 0.1 pound of shallots each year through 1967 less than 0.05 pound; since 1968, included in minor vegetables. ⁷ Excludes dehydrated onions beginning 1971.

Table 11—Canned vegetables: Per capita consumption, processed weight, averages 1947-49,
1957-59 and annual 1965 to date.¹

Period	Leafy, green and yellow vegetables							Tomato products							Other vegetables			
	Aspar-	Lima	Snap	Pump-	Catsup	Pulp	Tomato-	Corn	Pickles	Sauer-	Sweet-	Other	Total					
agus	beans	beans	beans	kin	and	and	to and	Beets	Beets	kraut	potato-	Other						
1947-49 ..	.6	.4	2.8	.4	5.7	.6	1.1	4.3	2.5	.9	4.2	1.1	5.2	3.3	.8	.4	1.4	39.1
1957-59 ..	.8	.4	4.1	.5	4.8	.6	1.0	4.6	3.5	.7	5.0	1.4	5.3	4.5	1.6	1.0	44.8	
Year																		
1965 ..	.8	.3	4.8	.6	4.1	.5	.8	4.5	5.0	.8	4.7	1.4	5.5	6.2	1.4	1.3	2.1	48.7
1966 ..	.7	.2	5.1	.7	4.2	.5	.7	4.6	4.8	4.2	1.0	4.4	5.2	6.6	1.4	1.2	2.1	49.0
1967 ..	.7	.4	5.1	.7	4.1	.5	.7	4.6	4.7	5.0	1.0	4.2	5.4	7.3	1.4	1.1	2.3	50.6
1968 ..	.7	.3	5.5	.6	4.2	.6	.8	4.9	5.9	9.8	1.1	4.0	5.8	7.7	1.6	1.3	2.1	52.3
1969 ..	.7	.4	5.7	.6	4.1	.5	.6	4.9	5.0	10.1	1.0	4.1	6.1	7.7	1.4	1.5	2.8	53.7
1970 ..	.7	.4	5.8	.6	3.9	.5	.8	4.8	5.0	10.1	1.0	4.1	5.9	7.4	1.5	1.2	2.7	52.9
1971 ..	.6	.4	5.9	.6	3.8	.5	.7	4.9	5.9	9.9	1.0	3.9	6.2	7.6	1.6	1.2	4.1	54.3
1972 ..	.6	.3	5.8	.8	3.8	.6	.8	5.1	5.10.2	1.1	3.7	1.5	6.5	7.8	1.4	1.1	4.1	55.2
1973 ..	.7	.3	5.9	.6	4.3	.6	.9	5.8	5.11.3	1.1	3.3	1.3	6.4	8.0	1.4	1.3	4.5	57.7
1974 ..	.5	.3	5.9	.6	3.5	.6	.9	5.0	5.12.0	1.2	3.6	1.3	6.0	7.8	1.5	1.5	4.7	56.9
1975 ..	.5	.3	5.6	.6	3.4	.6	.6	4.9	5.13.5	1.1	3.6	1.3	5.1	7.8	1.3	.9	4.0	55.1
1976 ..	.6	.3	6.0	.5	3.6	.5	.6	5.2	5.13.3	1.1	2.8	1.4	5.7	8.4	1.4	.9	3.4	55.7
1977 ^e ..	.4	.4	5.9	.6	3.9	.4	.6	5.0	5.13.6	.9	3.1	1.4	6.3	8.0	1.4	.8	3.2	55.9

¹ Excludes soups and baby food. Civilian consumption only. ² Based on information available for 1944-46; tomato juice comprises approximately 85 percent of the total, combination vegetable juices 13 percent, and other vegetable juices 2 percent. Combination vegetable juice contains approximately 70 percent or more tomato juice. ³ Includes miscellaneous greens, pimentos, potatoes, mixed vegetables, and all items, especially in earlier years, for which no separate data are available. ⁴ Estimated. ⁵ Estimate combines paste, sauce, catsup and chili sauce. ^e Preliminary.

Table 12—Vegetables, frozen: Per capita consumption, processed weight, averages 1947-49, 1957-59 and annual 1965 to date¹

Period	Leafy, green and yellow vegetables								Other vegetables					Potato products	Total ³					
	Aspara-gus	Snap beans	Lima beans	Carrots	Peas	Peas and carrots	Pump-kin and squash	Broc-coli	Brus-sels sprouts	South-ern greens	Spinach	Other ²	Cauli-flower	Corn cut-basis	Succo-tash	Onions	Rhu-barb			
Pounds																				
1947-49 . . . . .	.13	.28	.42	.07	.82	.05	.05	.16	.08	.27	.10	.08	.23	.04	(⁴)	.04	.04	2.86	
1957-59 . . . . .	.17	.77	.71	.26	1.61	.12	.10	.55	.19	(⁴)	.57	.61	.17	.65	(⁴)	.03	1.56	8.13	
Year																				
1965 . . . . .	.15	.91	.69	.51	1.98	(⁴)	.07	.68	.22	(⁴)	.62	.89	.20	1.13	(⁴)	.03	5.72	13.80	
1966 . . . . .	.16	1.06	.70	.55	2.05	(⁴)	.10	.71	.20	(⁴)	.68	1.08	.25	1.26	(⁴)	.03	6.93	15.76	
1967 . . . . .	.17	.90	.73	.66	1.88	(⁴)	.10	.77	.20	(⁴)	.70	1.07	.25	1.60	(⁴)	.03	7.58	16.64	
1968 . . . . .	.16	1.00	.74	.73	2.08	(⁴)	.12	.79	.18	(⁴)	.70	1.12	.26	1.59	(⁴)	.16	.03	8.50	18.16
1969 . . . . .	.15	.97	.63	.72	1.78	(⁴)	.13	.84	.23	(⁴)	.67	1.02	.30	1.44	(⁴)	.18	.04	9.84	18.94
1970 . . . . .	.14	1.05	.71	.76	1.86	(⁴)	.13	.83	.22	(⁴)	.68	1.07	.30	1.61	(⁴)	.25	.04	11.10	20.75
1971 . . . . .	.12	1.04	.64	.74	1.81	(⁴)	.14	.90	.22	(⁴)	.73	1.18	.35	1.47	(⁴)	.34	.04	12.12	21.84
1972 . . . . .	.10	1.07	.69	.81	1.81	(⁴)	.10	.99	.20	(⁴)	.72	1.12	.35	1.46	(⁴)	.51	.04	12.25	22.22
1973 . . . . .	.11	1.14	.69	.99	1.76	(⁴)	.16	1.06	.23	(⁴)	.67	1.32	.37	1.60	(⁴)	.53	.06	13.27	23.96
1974 . . . . .	.10	1.07	.63	1.00	1.74	(⁴)	.10	1.04	.26	(⁴)	.78	.96	.41	1.56	(⁴)	.49	.06	13.21	23.41
1975 . . . . .	.09	.88	.55	.89	1.71	(⁴)	.09	.95	.23	(⁴)	.34	.65	.35	1.53	(⁴)	.59	(⁴)	13.89	23.54
1976 . . . . .	.11	1.14	.47	.92	1.63	(⁴)	.10	1.04	.25	(⁴)	.71	1.12	.39	1.56	(⁴)	.66	(⁴)	14.76	25.01
197709	1.00	.53	.99	1.52	(⁴)	.11	1.15	.24	(⁴)	.35	.73	.87	.41	1.77	(⁴)	.69	(⁴)	15.98	26.32

¹ Civilian consumption only. ² Included with leafy, green, and yellow because most items included are considered to be green. ³ Computed from unrounded data. ⁴ Included with "other". ⁵ Preliminary.

Table 13—Vegetables, fresh: Representative prices for stock of generally good quality and condition (U.S. No. 1 when available), New York, Chicago, and shipping point, indicated periods, 1977 and 1978

Market and commodity	State of origin	Unit	Tuesday					
			1977			1978		
			May 10	June 14	July 12	May 9	June 13	July 11
----- Dollars -----								
Terminal markets:								
New York								
Beans, snap, green	New Jersey	Bu. basket	---	---	4.75	---	---	6.50
Broccoli	California	14-bchs., crt. & ctn.	6.00	4.75	6.00	---	9.25	8.25
Cabbage								
Domestic, round type	New Jersey	Various used crates	---	---	2.75	---	---	6.25
Cantaloups	California	36's jumbo crt.	---	17.00	17.00	---	17.50	23.50
Carrots, topped, washed	California	48-1 lb. film bag ctn.	9.00	8.00	7.50	11.50	8.50	---
Cauliflower	California	Carton 12's	8.50	---	12.00	11.50	11.50	13.50
Celery								
Pascal	California	2-3 doz., crt.	11.00	6.50	10.00	16.00	23.00	18.00
Lettuce, Iceberg	California	2 doz., ctn.	6.25	6.00	7.75	12.50	11.50	7.75
Spinach, Savoy	New Jersey	Bu. basket	3.50	---	---	---	---	---
Tomatoes	Ohio	8 lb. bskt., med.	---	3.75	4.50	---	---	---
Chicago								
Broccoli	California	14's crt. & ctn.	6.90	5.50	6.00	7.75	---	7.75
Cabbage								
Domestic, round type	Illinois	Various used crates	---	---	2.35	---	---	6.50
Cantaloups	California	36's jumbo crt.	---	---	17.50	---	16.50	20.00
Carrots, topped, washed	California	48-1 lb. film bag, ctn.	8.25	7.75	7.25	8.75	8.25	12.50
Cauliflower	California	Film wrpd., ctos, 12's ...	7.35	9.00	---	11.00	11.50	9.00
Celery								
Pascal	California	2-3 doz., crt.	9.70	7.75	9.00	14.00	18.50	15.00
Pascal	Michigan	2-4 doz., crt.	---	---	---	---	---	---
Cucumbers	Illinois	Bu. basket	---	---	11.65	---	---	18.00
Honeydews	California	2/3-flat crt. 5-8's	---	---	5.50	---	---	---
Lettuce, Iceberg	California	2 doz., heads, ctn.	6.25	5.25	7.25	13.25	10.75	8.25
Spinach, flat type	Illinois	Bu. basket	---	5.00	---	---	4.50	---
Tomatoes	Illinois	10-lb. baskt., med-lge.	4.25	---	3.65	5.00	---	---
Week ended								
			1977			1978		
			May 14	June 11	July 9	May 13	June 10	July 8
----- Dollars -----								
F.o.b. shipping point:								
Onions, medium	Texas	50 lb. sack Grano	---	4.15	4.00	---	3.60	---
Onions, medium	California	50 lb. sack Grano	4.10	3.63	3.66	3.03	3.00	3.25
Watermelons	Florida	25 lb. av. and larger per cwt.	6.30	2.80	2.75	---	5.07	3.66

Source: Market News Report, AMS, USDA.

Table 14—Fresh Vegetables: Retail price, marketing margin, and grower and packer return per unit,
sold in New York City, indicated months, 1977 and 1978

Commodity, month, and retail unit	Retail price	Marketing margin		Grower and packer return (Fob shipping point prices) ^{1, 2}	
		Absolute	Percentage of retail price	Absolute	Percentage of retail price
		--- Cents ---		cents	Percent
Carrots (Pound)					
April 1978	31.3	22.7	73	8.6	27
March 1978	33.2	23.1	70	10.1	30
April 1977	37.5	24.1	64	13.4	36
Celery (lb.)					
April 1978	39.6	26.3	66	13.3	34
March 1978	40.8	29.6	73	11.2	27
April 1977	35.9	25.6	71	10.3	29
Corn, sweet (doz. ears)					
April 1978	283.8	174.0	61	109.8	39
March 1978	317.2	180.0	57	137.2	43
April 1977	NA	NA	NA	137.3	NA
Cucumbers (lb.)					
April 1978	63.3	28.8	45	34.5	55
March 1978	52.1	23.3	45	28.8	55
April 1977	58.2	39.8	68	18.4	32
Lettuce (head)					
April 1978	64.7	42.3	65	22.4	35
March 1978	54.2	42.1	78	12.1	22
April 1977	53.6	42.4	79	11.2	21
Onions, dry yellow (lb.)					
April 1978	22.8	12.9	57	9.9	43
March 1978	20.8	15.2	73	5.6	27
April 1977	43.6	21.8	50	21.8	50
Peppers, green (lb.)					
April 1978	77.8	26.8	34	51.0	66
March 1978	54.8	32.7	60	22.1	40
April 1977	122.0	66.9	55	55.1	45
Tomatoes, vine-ripe (lb.)					
April 1978	78.2	53.5	68	24.7	32
March 1978	80.4	36.3	45	44.1	55
April 1977	95.7	37.5	39	58.2	61

¹For quantity of product equivalent to retail unit sold to consumers; because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. ²Production areas: Carrots-CALIFORNIA, Celery-CALIFORNIA, Corn-FLORIDA, Cucumbers-FLORIDA, Arizona (Mar '78), Lettuce-CALIFORNIA, Onions-TEXAS, Peppers-FLORIDA, Tomatoes-FLORIDA.

Table 15—Fresh vegetables: Representative truck rates for selected fresh vegetables, Jan.-June 1977-78¹

Commodity, area and city	1977						1978					
	Jan.	Feb.	Mar.	Apr.	May	June	Jan.	Feb.	Mar.	Apr.	May	June
<i>Dollars per package</i>												
Cabbage (wirebound crate)												
Southern Florida to:												
Atlanta	1.25	1.25	1.25	1.25	1.40	1.40	.88	NA	.75	.88	1.25	1.25
Chicago	1.75	1.75	1.75	1.75	1.90	1.90	1.85	1.88	1.50	1.62	2.05	2.05
New York City	1.65	1.65	1.65	1.65	1.90	1.90	1.78	1.82	1.60	1.70	1.95	1.70
Rio Grande Valley, Tex. to:												
Chicago	NA	NA	NA	NA	NA	NA	1.96	1.96	2.00	2.00	2.00	2.00
New York City	NA	NA	NA	NA	NA	NA	2.65	2.65	2.89	2.89	2.89	2.89
Carrots (48/1 lb. film)												
Imperial Valley, Calif. to:												
Chicago	2.30	2.92	2.46	2.92	---	---	2.62	2.92	2.61	2.57	---	---
New York City	3.07	3.69	3.23	3.69	---	---	3.38	4.00	3.69	3.86	---	---
Seattle	1.38	1.69	1.54	1.69	---	---	1.69	1.85	1.38	1.43	---	---
Rio Grande Valley, Tex. to:												
Chicago	NA	NA	NA	NA	NA	NA	1.55	1.55	1.78	1.78	1.79	1.79
New York City	NA	NA	NA	NA	NA	NA	NA	NA	2.73	2.42	2.42	2.42
Celery (wirebound crate)												
Southern California to:												
Chicago	2.20	2.70	2.55	2.60	2.65	2.90	2.75	2.85	2.85	2.75	2.75	2.80
New York City	2.90	4.40	3.48	3.88	3.88	4.12	3.70	3.70	3.75	3.50	3.50	3.90
Southern Florida to:												
Atlanta	1.25	1.25	1.25	1.25	1.40	1.40	1.12	1.05	1.05	1.02	1.25	1.25
Chicago	1.75	1.75	1.75	1.75	1.90	1.90	1.85	1.90	1.90	1.92	2.05	2.05
New York City	1.65	1.65	1.65	1.65	1.90	1.90	1.78	1.85	1.82	1.85	1.95	1.95
Corn (wirebound crate)												
Southern Florida to:												
Chicago	1.45	1.45	1.45	1.45	1.55	1.55	1.52	1.58	1.55	1.60	1.75	1.75
Los Angeles	1.90	1.90	1.90	1.90	2.00	2.00	1.65	1.60	1.68	1.92	2.05	2.05
New York City	1.35	1.35	1.35	1.35	1.45	1.45	1.42	1.50	1.45	1.55	1.60	1.60
Lettuce (24 head ctn)												
Imperial Valley, Calif. to:												
Atlanta	2.00	2.50	1.75	2.50	---	---	1.88	2.00	1.87	2.00	---	---
Chicago	1.87	2.37	2.00	2.37	---	---	2.13	2.37	2.12	2.00	---	---
New York City	2.50	3.00	2.63	3.00	---	---	2.75	3.25	3.00	3.38	---	---
Onions, dry (50-lb. sack)												
Western and Central New York to:												
Boston .....	.55	.55	.55	.55	---	---	.55	.60	.60	.60	.55	---
New York City .....	.55	.55	.55	.55	---	---	.55	.55	.60	.60	.55	---
Potatoes (100-lb. sack)												
Idaho Fall, Idaho to:												
Atlanta	3.38	3.38	3.38	3.38	---	---	3.50	3.50	3.50	3.45	---	---
Chicago	2.55	2.55	2.55	2.55	---	---	2.70	2.88	2.88	2.70	---	---
Los Angeles	1.25	1.28	1.28	1.28	---	---	1.30	1.40	1.40	1.35	---	---
New York City	4.25	4.25	4.25	4.25	---	---	4.50	4.50	4.38	4.62	---	---
Yakima, Wash. to:												
Atlanta	4.05	4.00	3.88	3.92	---	---	4.30	4.30	4.25	4.25	---	---
Chicago	3.40	3.50	3.62	3.62	---	---	3.50	3.50	3.38	3.38	---	---
Los Angeles	1.50	1.55	1.60	1.45	---	---	5.25	5.25	5.25	5.25	---	---
New York City	5.25	5.12	5.08	5.25	---	---	1.62	1.55	1.55	1.55	---	---
Presque Isle, Maine to:												
Boston .....	.90	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.05	1.05	1.10	1.10
New York City	1.30	1.40	1.40	1.40	1.40	1.40	1.50	1.50	1.60	1.60	1.70	1.70
Western and Central New York to:												
Atlanta	1.45	1.45	1.45	1.45	1.45	---	1.65	1.65	1.65	1.55	1.55	---
Boston	1.10	1.10	1.10	1.10	1.10	---	1.10	1.10	1.20	1.10	1.10	---
New York	1.05	1.05	1.05	1.05	1.05	---	1.10	1.20	1.10	1.00	1.10	---

¹ Reported from a sample of shippers and/or truck brokers in specified areas for shipments during first week of month.

NA—not available.

Table 16—Fresh vegetables: Representative rail rates for selected vegetables, January-June 1977-78

	1977						1978					
	Jan.	Feb.	Mar.	Apr.	May	June	Jan.	Feb.	Mar.	Apr.	May	June
----- Dollars per package -----												
Carrots (48/lb. carton)												
Salinas, California to:												
Chicago	1.88	1.90	1.90	1.93	1.93	1.93	2.06	2.06	2.06	2.06	2.06	2.06
New York City	2.63	2.71	2.71	2.75	2.75	2.75	2.87	2.87	2.87	2.87	2.87	2.87
Rio Grand Valley, Texas to:												
Chicago	1.32	1.37	1.37	1.40	1.40	1.40	1.46	1.46	1.46	1.46	1.46	1.46
New York City	1.66	1.72	1.72	1.75	1.75	1.75	1.83	1.83	1.83	1.83	1.83	1.83
Lettuce (24 head carton)												
Salinas, California to:												
Baltimore	2.18	2.34	2.34	2.38	2.38	2.38	2.49	2.49	2.49	2.49	2.49	2.49
Chicago	1.73	1.79	1.79	1.82	1.82	1.82	1.90	1.90	1.90	1.90	1.90	1.90
New York City	2.26	2.34	2.34	2.38	2.38	2.38	2.49	2.49	2.49	2.49	2.49	2.49
Potatoes (100/lb. sack)												
Bakersfield, California to:												
Chicago	3.54	3.66	3.66	3.73	3.73	3.73	3.89	3.89	3.89	3.89	3.89	3.89
Idaho Falls to:												
Atlanta	3.17	3.29	3.29	3.33	3.33	3.33	3.48	3.48	3.48	3.48	3.48	3.48
Chicago	2.94	3.04	3.04	3.10	3.10	3.10	3.23	3.23	3.23	3.23	3.23	3.23
Los Angeles	1.60	1.65	1.65	1.70	1.70	1.70	1.77	1.77	1.77	1.77	1.77	1.77
New York City	3.81	3.93	3.93	4.00	4.00	4.00	4.17	4.17	4.17	4.17	4.17	4.17
Yakima, Washington to:												
Atlanta	4.55	4.80	4.80	4.87	4.87	4.87	5.09	5.09	5.09	5.09	5.09	5.09
Chicago	3.31	3.53	3.53	3.59	3.59	3.59	3.75	3.75	3.75	3.75	3.75	3.75
New York City	4.09	4.35	4.35	4.43	4.43	4.43	4.62	4.62	4.62	4.62	4.62	4.62
Grand Forks, North Dakota to:												
Chicago	1.72	1.77	1.77	1.83	1.83	1.83	1.90	1.90	1.90	1.90	1.90	1.90

Table 17—Canned vegetables: Commercial pack and canners' seasonal supply, shipments to latest month; and total seasonal shipments, selected commodities

Commodity and season	Carryover	Pack	Seasonal supply	Shipments to latest month	Total seasonal shipments
--- Million cases 24/303's ---					
Asparagus					
1973-74	1.5	5.8	7.3	¹ 2.3	6.1
1974-75	1.2	5.6	6.8	¹ 2.6	4.4
1975-76	2.4	3.6	6.0	¹ 3.1	4.8
1976-77	1.1	3.6	4.7	¹ 2.4	4.4
1977-78 . . . . .	.3	3.7	4.0	N.A.	3.4
1978-79 . . . . .	.6	N.A.	N.A.	N.A.	N.A.
Beans, lima					
1973-74 . . . . .	.1	3.2	3.3	² 2.5	3.1
1974-75 . . . . .	.2	2.5	2.7	³ 2.2	2.5
1975-76 . . . . .	.2	3.7	3.9	³ 2.6	3.0
1976-77	1.0	2.8	3.8	³ 2.7	55.3
1977-78 . . . . .	.6	2.7	3.3	³ 2.8	N.A.
Beans, snap					
1973-74	2.7	55.0	57.7	³ 51.4	52.5
1974-75	5.2	62.3	67.5	³ 52.1	52.2
1975-76	15.3	55.4	70.7	³ 54.5	57.1
1976-77	13.6	47.4	61.0	³ 53.2	55.3
1977-78	5.7	54.5	60.2	³ 52.7	N.A.
Beets					
1973-74 . . . . .	.9	11.3	12.2	⁴ 10.2	11.3
1974-75 . . . . .	.9	14.8	15.7	⁴ 9.8	11.6
1975-76	4.0	13.4	17.4	⁴ 9.4	12.4
1976-77	5.1	9.2	14.3	⁴ 9.4	11.6
1977-78	2.6	11.3	13.9	⁴ 9.6	N.A.
Carrots					
1973-74	1.0	6.2	7.2	⁴ 4.9	5.0
1974-75	2.2	7.2	9.4	⁴ 4.8	5.5
1975-76	3.9	5.0	8.9	⁴ 5.3	6.3
1976-77	2.6	5.3	7.9	⁴ 5.4	6.2
1977-78	1.8	6.0	7.8	⁴ 5.1	N.A.
Corn, sweet					
1973-74	6.3	55.2	61.5	³ 54.6	57.6
1974-75	3.9	46.4	50.3	³ 42.6	45.2
1975-76	5.1	57.5	62.6	³ 49.2	52.9
1976-77	9.7	54.7	64.4	³ 51.7	54.7
1977-78	9.7	56.3	66.0	³ 55.2	N.A.
Peas, green					
1973-74	3.6	29.6	33.2	³ 31.7	31.7
1974-75	1.5	33.1	34.6	³ 30.0	30.0
1975-76	4.5	35.2	39.7	³ 31.3	31.3
1976-77	8.4	31.9	40.3	³ 32.6	32.6
1977-78	7.7	30.2	37.9	³ 33.6	N.A.

¹ August 1. ² May 1. ³ June 1. ⁴ April 1. N.A.—Not available.

National Food Processors Association.

Table 18—Vegetables, frozen: United States commercial packs 1976 and 1977, and cold storage holdings, July 1 with comparisons

Commodity	Packs		Cold storage holdings		
	1976	1977	July 1, 1976	July 1, 1977	July 1, 1978 ¹
----- Million pounds -----					
Asparagus	24	22	21	20	11
Beans, lima:					
Fordhook	25	45	20	9	10
Baby	44	92	50	22	31
Total	69	137	70	31	41
Beans, snap:					
Regular cut	114	142	54	23	24
French cut	60	83	21	10	13
Wax	7	6	(²)	(²)	(²)
Total	181	231	75	33	37
Broccoli	202	314	84	109	112
Brussels sprouts	45	57	27	9	16
Carrots	181	264	65	49	96
Cauliflower	68	97	24	10	20
Corn, cut	282	261	103	93	87
Corn-on-cob	188	265	43	37	71
Mixed vegetables	(²)	(²)	33	31	31
Mushrooms	6	10	(²)	(²)	(²)
Onions	149	153	22	21	28
Peas	340	334	189	162	167
Peas and carrots	(²)	(²)	12	11	11
Pumpkin and squash	22	25	(²)	(²)	(²)
Rhubarb	8	9	(²)	(²)	(²)
Southern greens ³	68	82	41	32	42
Spinach	160	168	128	117	88
Okra	28	42	22	8	24
Peas, blackeye	31	36	4	6	11
Miscellaneous vegetables	104	116	123	117	140
Total ⁴	2,156	2,623	1,086	897	1,033
French fried potatoes	2,876	3,119	651	771	841
Other frozen potatoes	459	504	106	115	116
Total frozen potatoes	3,335	3,623	757	886	956
Grand total ⁴	5,491	6,246	1,843	1,784	1,989

¹ Preliminary. ² Included in miscellaneous vegetables. ³ Includes collards, kale, mustards, turnips green/turnips. ⁴ May not add due to rounding.

Pack data from American Frozen Food Institute. Stocks from Cold Storage Report, ESCS, USDA, issued monthly.

Table 19—Potatoes: Prices f.o.b. shipping points and wholesale price at New York and Chicago,
U.S. No. 1 indicated periods 1977 and 1978

Item	State	Week ended					
		1977			1978		
		May 14	June 11	July 9	May 13	June 10	July 8
----- Dollars per 100 lb. sack -----							
F.o.b. shipping points Kern County Long Whites	California	---	5.40	3.69	---	7.65	9.25
Hi Plains-Panhandle Dist. Round Reds	Texas	---	---	---	---	---	---
Southern points Rounds Reds	Alabama	---	7.85	6.00	---	---	10.00
Round Whites	Virginia	---	---	6.00	---	---	8.38
Tuesday nearest mid-month							
		1977			1978		
		May 10	June 14	July 12	May 9	June 13	July 11
----- Dollars per 100 lb. sack -----							
Terminal markets New York Long Whites	California	---	---	5.75	---	7.25	---
Katahdin, 2" min.....	Maine	5.12	5.50	---	3.00	4.35	---
----- Dollars per 100 lb. sack -----							
Chicago Long Whites	California	---	10.00	8.50	---	12.38	13.75

F.o.b. prices are the simple averages of the mid-point of the range of daily prices. Market prices are for Tuesday of each week, and are submitted by Market News representatives to the Fruit and Vegetable Division of AMS.

Table 20—Sweetpotatoes: Representative wholesale price (wholesale lots) at New York and Chicago for stocks of generally good merchantable quality and condition (U.S. No. 1, when available) indicated periods, 1977 and 1978

Item	State	Tuesday nearest mid-month					
		1977			1978		
		May 10	June 14	July 12	May 9	June 13	July 11
----- Dollars per 50 lb. container -----							
Terminal markets New York Porto Rico, cured	North Carolina	10.75	---	17.00	11.50	---	20.00
Chicago Porto Rico, cured	Louisiana	---	---	---	---	---	---

Prices submitted for Tuesday of each week by the Market News representative at New York and Chicago.

LETTUCE—PRICES, COSTS, AND MARGINS

By Stephen Raleigh, Agricultural Economist
Commodity Economics Division
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ABSTRACT: The retail value of Iceberg lettuce sold in Chicago and New York City has increased an average of 55 cents per 24-head carton each year between 1967 and 1977. The wholesale and retail margin increased 31 cents per year per carton; rail transportation cost went up 10 cents; harvesting and packing costs rose 8 cents; and the grower's return rose an average of 1.5 cents. The wholesaler's and retailer's share of the retail value increased and the grower's share declined. Other market shares changed little.

KEYWORDS: Lettuce, retail price, costs, margins, grower returns.

Lettuce has become the most important fresh vegetable in the United States from a dollar value standpoint, if potatoes are considered a field crop. The U.S. farm value of lettuce in 1977 was over \$424 million. This is the second year that lettuce has been valued more than fresh tomatoes; tomatoes were \$407 million. This total represents slightly under one-quarter of the farm value of all vegetables grown for the fresh market. This is a slight increase in relative share of total production that lettuce has held during the past decade.

Lettuce is easily the most popular raw vegetable today. With its extensive use as a basic salad

ingredient and its decorative effect with other foods, per capita use increased to 24.5 pounds in 1977, up 3.1 pounds from a decade ago. While use of many other fresh vegetables was declining, consumption of lettuce per person was increasing slowly but steadily over the past half century.

Lettuce is produced commercially in 17 States (including Hawaii). California and Arizona dominate, together accounting for 89 percent of all U.S. commercially-produced lettuce in 1977 (table 1). That year 5.6 billion pounds of lettuce were produced nationally, 31 percent more than a decade ago. During this decade, production increased

Table 1—Lettuce: Production for fresh market, selected States and United States, 1967-77

Seasons	California		Arizona		Other States		United States Total
	Amount	Percentage of total	Amount	Percentage of total	Amount	Percentage of total	
1967	26,330	61	8,706	20	7,930	19	42,966
1968	29,006	66	8,087	18	7,180	16	44,273
1969	28,915	64	9,148	21	6,811	15	44,874
1970	31,810	68	8,421	18	6,309	13	46,540
1971	32,300	68	8,834	18	6,233	13	47,367
1972	34,867	72	8,276	17	5,577	11	48,720
1973	35,310	70	8,397	17	6,828	13	50,535
1974	36,443	71	8,493	17	6,495	12	51,431
1975	39,139	73	8,152	15	6,367	12	53,658
1976	39,640	73	7,676	14	6,639	13	53,955
1977	42,026	75	8,041	14	6,166	11	56,233

sharply in California and declined in other States. California's share increased from 61 percent in 1967 to 75 percent in 1977.

Most of the lettuce grown in California is of the Iceberg type, more commonly called head lettuce. This article presents an analysis of Iceberg lettuce prices, marketing margins, costs, and grower returns.

Procedures

In this study lettuce was priced at two marketing levels—California shipping points, and at retail in Chicago and New York City. Retail prices were collected monthly by the Bureau of Labor Statistics (BLS) in a sample of retail stores on Tuesday, Wednesday, and Thursday during the first week containing a Tuesday. The shipping point price used is an average of daily prices for the week preceding the retail pricing week. Shipping point prices are weighted by monthly rail and truck unloads of California lettuce in Chicago and New York City to obtain the seasonal average price, calendar year basis.

The retail value of a carton of lettuce is the return to the retailer for salable lettuce (retail price minus 7 percent allowance for spoilage). Transportation costs are based on rail rates from Salinas, California to Chicago and New York. Harvesting and packing costs are reported by the Agricultural Extension Service of California. Returns for growing are derived from shipping point prices by deducting harvesting and packing cost. The wholesale and retail margin is derived by deducting the shipping point price and the transportation cost from the retail value. This margin represents payments for wholesaling, intra-city transportation, and retailing, functions which may be performed by one or more firms.

Prices, Costs, and Margins

The retail price per head of lettuce increased sharply over the last decade, 1967 to 1977. The U.S. average retail price (BLS) of Iceberg lettuce increased 73 percent during this period, that is, from 27.6 cents per head in 1967 to 47.6 per head in 1977. The retail price increased slightly over 2 cents per head per year. The price increase was not a steady climb, but fluctuated sharply during any given year. Prices in 1976 varied from a low of 38.2 cents in March to a high of 70.1 cents per head in October. Prices for lettuce in 1977 were more stable, varying from a low of 41.4 cents in May to a high of 56.8 cents in December, but have gone wild in 1978, reaching as high as \$1.39 during May in New York City.

Price changes were normally caused by shifts in supplies. Supplies were variable usually due to

weather conditions at planting time, during growing season, or at harvest time.

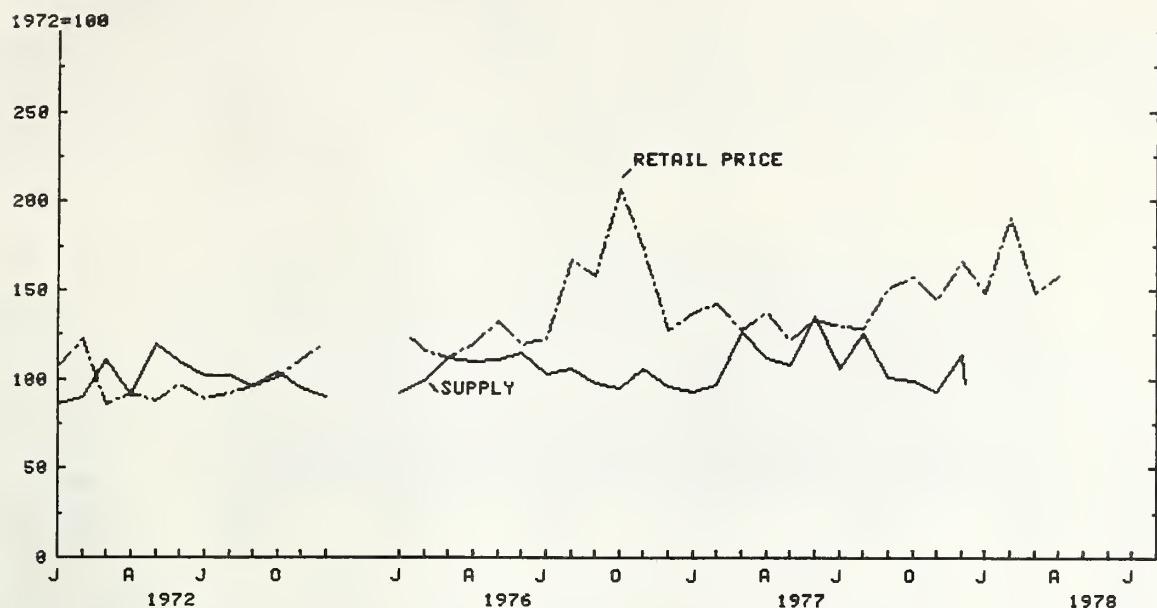
Weather conditions have had a very large impact on the supply and price of lettuce this past winter and spring. During January, the fields in the Imperial Valley of California were so wet they could not be harvested, sending the f.o.b. price up over \$10 per carton. This same rain delayed Salinas area planting so that by late April the f.o.b. price for a carton of 24 heads had climbed to \$16.50 for a weekly average. Supplies and prices often changed sharply within a matter of weeks or even days. Although usually responsive to supply changes, retail lettuce prices sometimes lagged behind changes in supply. Figure 1 shows the response of changes in monthly U.S. average retail prices to change in monthly supplies (41-city unloads for 1972, and 1976 to date).

The retail value of a 24-head carton of lettuce sold in the Chicago and New York City market averaged \$11.73 in 1977, 89 percent higher than in 1967 (figure 2). The wholesale and retail margin increased percentagewise more rapidly than the retail price to \$6.75. Rail transportation costs from California to Chicago and New York City held generally steady to slightly higher in the early 1960's, but since then there have been some sharp increases.

In the last 10-year period rail transportation costs have doubled. This doubling of rail charges, and the lack of cars, may be reasons for the large shift from rail to truck shipment of lettuce. In 1970, 80 percent of New York's lettuce came by rail, but by 1976 this had dropped to 38 percent. Chicago unloads were 87 percent rail in 1970 and now only 61 percent. Harvesting and packing costs in California rose from \$1.02 per carton in 1967 to \$1.85 in 1977, an 81-percent increase. Returns to growers in California fluctuated yearly, from a low of 89 cents per carton in 1968 to \$2.14 in 1973. In 1976, grower returns were \$1.84 cents per carton, dropping to \$1.07 in 1977.

Figure 2 illustrates the continued upward price trend for lettuce. It indicates that the retail value of Iceberg lettuce sold in New York City and Chicago increased an average of 55 cents per carton per year in the period 1967-76. Prices increased slowly the first 6 years but larger increases took place between 1970 and 1977. During this same period, the wholesale and retail margin increased 31 cents per year per carton; transportation cost went up 10 cents; harvesting and packing costs rose 8 cents; and the grower's returns rose an average of 9 cents per carton per year through 1976. In 1977, grower returns per carton fell drastically to \$1.07 per carton; this is only 16 percent higher than in 1967, which is less than a 1.5-cent increase per carton per year.

LETTUCE SUPPLY AND PRICE INDEX*



* 1972 BASE YEAR, COMPARING 1972 WITH 1976, 1977 AND 1978. 41-CITY CARLOT UNLOADS AND U.S. AVERAGE RETAIL PRICE.

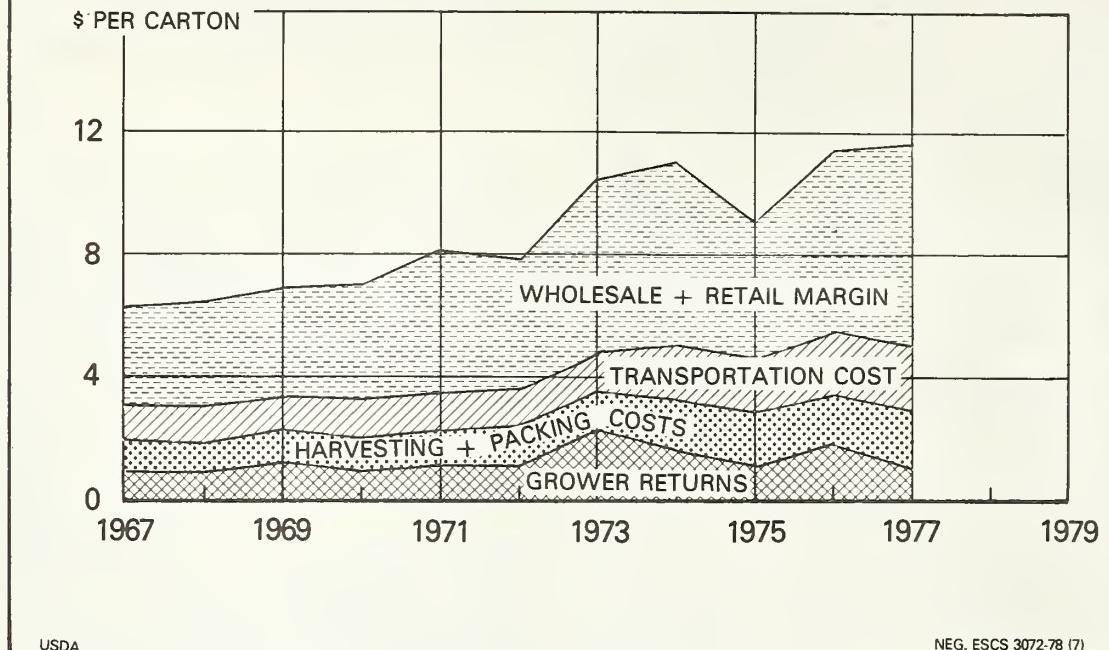
Figure 1

Data - Figure 1—Lettuce supply and price (Index - 1972 average = 100)

Month	1972		1976		1977		1978
	Supply*	Price	Supply*	Price	Supply*	Price	Price
January	86	107	92	128	93	137	148
February	90	122	99	115	97	142	190
March	111	86	112	112	126	127	148
April	91	92	110	119	112	137	158
May	119	88	111	132	108	121	
June	110	97	114	119	135	133	
July	102	89	103	122	106	129	
August	102	92	106	167	125	128	
September	96	96	98	158	101	151	
October	104	101	95	206	99	157	
November	95	111	106	173	93	144	
December	90	120	96	127	113	166	

*41 city unloads.

LETTUCE PRICES, MARGIN, COSTS AND RETURNS CHICAGO AND NEW YORK CITY



USDA

NEG. ESCS 3072-78 (7)

Figure 2

Data - Figure 2—Lettuce prices, margins, costs and returns, Chicago and New York City average

	Grower returns	Harvesting and packing costs	Transportation costs	Wholesale and retail margin	Retail value
<i>Dollars per carton</i>					
1967 .....	.92	1.02	.97	3.29	6.20
1968 .....	.89	1.04	.99	3.34	6.26
1969	1.19	1.05	1.02	3.67	6.93
1970 .....	.92	1.10	1.14	3.83	6.99
1971	1.14	1.15	1.33	4.41	8.03
1972	1.06	1.25	1.37	4.14	7.82
1973	2.14	1.40	1.35	5.51	10.40
1974	1.62	1.70	1.59	6.23	11.14
1975	1.12	1.70	1.83	5.28	9.93
1976	1.84	1.80	1.94	6.06	11.64
1977	1.07	1.85	2.06	6.75	11.73

The wholesaler's and retailer's share of lettuce changed very little from 1967 to 1976, but increased markedly (6 percentage points) in 1977. The grower's share, although highly variable, changed little also until 1977 when it dropped drastically. For 10 years the wholesale and retail margin averaged 52 percent of retail value, jumping to 58 percent in 1977. Rail transportation was 17 percent and harvesting and packing cost 16 percent for the period studied. The grower's return varied from a low of 9

percent in 1977 to a high of 20 percent in 1973 with extremes in supply, weather, and other market changes.

Consumers in New York on the average paid a higher price for lettuce than did consumers in Chicago (tables 2 and 3). In 8 out of the last 10 years New York paid 1.5 to 7.0 cents more per head, usually about 3 cents. In 2 years, 1974 and 1976, the average price was higher in Chicago. The 1976 difference was also less than one-half cent per

head. Higher retail prices in New York usually reflected higher transportation charges and the city's larger wholesale and retail margins. Cost of rail transportation from California to New York City was 23 to 56 cents per carton higher than to Chicago. Wholesale and retail margins in New York were 24 to 66 cents per carton higher than in Chicago through 1976 compared with \$1.18 in 1972 and 6 cents different in 1977. This margin completely reversed the usual relationship in 1974 and 1976, with Chicago's margin being higher than New York City.

Growers received about the same returns for lettuce sold in either Chicago or New York City. Slight differences in the season average growers' returns are caused by weighting monthly shipping point prices by carlot unloads in each city.

Since the wholesale and retail margin and transportation costs usually took slightly larger shares of the retail value in New York City, percentage shares for harvesting and packing and grower returns in New York were less than in Chicago.

Table 2—Iceberg, Lettuce: Seasonal average prices, margins, costs and returns, Chicago¹

Seasons	Retail price per head	Retail value per carton ²	Wholesale and retail margin		Transportation costs ³		Harvesting and packing costs ⁴		Grower returns ⁵	
			Per carton	Percentage of retail value	Per carton	Percentage of retail value	Per carton	Percentage of retail value	Per carton	Percentage of retail value
1967 . . .	26.9	6.00	3.15	52	.84	14	" 1.02	17	.99	17
1968 . . .	26.6	5.94	3.12	53	.85	14	" 1.04	17	.93	16
1969 . . .	29.7	6.63	3.54	53	.87	13	1.05	16	1.17	18
1970 . . .	29.1	6.49	3.56	55	.90	14	" 1.10	17	.93	14
1971 . . .	33.7	7.52	4.07	54	1.08	14	1.15	16	1.22	16
1972 . . .	30.8	6.87	3.45	50	1.11	16	1.25	18	1.06	16
1973 . . .	43.9	9.80	5.10	52	1.11	11	1.40	14	2.19	22
1974 . . .	53.1	11.85	7.28	61	1.30	11	" 1.70	14	1.57	14
1975 . . .	42.5	9.49	5.12	54	1.51	16	1.70	18	1.16	12
1976 . . .	52.3	11.67	6.07	52	1.70	15	1.80	15	2.10	18
1977 . . .	51.4	11.48	6.71	58	1.81	16	1.85	16	1.11	10

¹ 24 heads per carton, Season: January through December. ² Returns to retailer for salable lettuce (7-percent allowance for loss incurred during marketing process). ³ Rail costs for Salinas, California. ⁴ Sample contract harvesting, packing and hauling costs for Salinas-Watsonville area of California. Source: California Agricultural Extension Service. ⁵ Returns to California growers (F.o.b. shipping point prices minus harvesting and packing costs). ⁶ Estimated.

Table 3—Iceberg, Lettuce: Seasonal average prices, margins, costs and returns, New York City¹

Seasons	Retail price per head	Retail value per carton ²	Wholesale and retail margin		Transportation costs ³		Harvesting and packing costs ⁴		Grower returns ⁵	
			Per carton	Percentage of retail value	Per carton	Percentage of retail value	Per carton	Percentage of retail value	Per carton	Percentage of retail value
1967 . . .	28.4	6.34	3.39	53	1.05	17	" 1.02	16	.88	14
1968 . . .	29.0	6.47	3.48	54	1.08	17	" 1.04	16	.87	13
1969 . . .	32.0	7.14	3.78	53	1.10	15	1.05	15	1.21	17
1970 . . .	32.7	7.30	4.04	55	1.25	17	" 1.10	15	.91	13
1971 . . .	37.2	8.30	4.59	55	1.46	18	1.15	14	1.10	13
1972 . . .	37.7	8.42	4.63	55	1.48	18	1.25	15	1.06	12
1973 . . .	48.2	10.76	5.76	54	1.49	14	1.40	13	2.11	20
1974 . . .	48.2	10.76	5.68	53	1.74	16	" 1.70	16	1.64	15
1975 . . .	45.5	10.16	5.37	53	1.99	20	1.70	17	1.10	11
1976 . . .	52.0	11.61	5.76	50	2.17	19	1.80	16	1.88	18
1977 . . .	53.9	12.03	6.78	56	2.37	20	1.85	15	1.03	9

¹ 24 heads per carton, Season: January through December. ² Returns to retailer for salable lettuce (7-percent allowance for loss incurred during marketing process). ³ Rail costs from Salinas, California. ⁴ Sample contract harvesting, packing and hauling costs for Salinas-Watsonville area of California. Source: California Agricultural Extension Service. ⁵ Returns to California growers (F.o.b. shipping point price minus harvesting and packing costs). ⁶ Estimated.

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